CADCAT

USER MANUAL

VERSION 1.2
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Introduction

CADCAT is a database tracking software package, which is based on the Center for Substance Abuse Prevention's (CSAP) Minimum Data Set (MDS), a nationally recognized standard. MDS is a collection of standard data elements developed by CSAP to enable states, substance abuse agencies, community-based service providers, and others to quantify and compare the number and type of primary prevention and early intervention services delivered. The use of these standards provides a consistent and comprehensive basis to collect and analyze data. Also, additional features have been added onto the MDS standard that will allow greater flexibility and customization for your state as well as easily incorporating science-based or evidence-based programs into the prevention system. A summary list of MDS Codes is available online in your support website.

The software is designed to use a Needs Assessment to choose targeted risk and protective factors, base goals and objectives on these risk and protective factors, track prevention activities aimed at accomplishing the goals and objectives, and evaluate the progress of the goals and the outcomes (success) of the programs. In addition, CADCAT facilitates information sharing and tracking meeting results between the Prevention Partners and Coordinating agencies.

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FEATURES

CADCAT MODULES

The following table gives an overview of all the menu choices in CADCAT. Different menus will appear at different levels. Some menus are grayed out and are not useable at this time or you do not have permissions to see them.

Assessment	
Choose Targeted Factors	You will be able to gauge the risk factors that your prevention programs should be targeting and the protective factors to counteract those risk factors
Planning	
Goals/Objectives	The "Goals/Objectives" area allows the individual county agencies to put together the prevention Goals they have set throughout the fiscal year.
Program	
Program	The Program module allows you to choose either a Science-based program or a local innovative program and enter the appropriate information related to the program.
Activities	
Data Collection Forms	The Data Collection Forms area is an archive of forms that can be used to collect data during services for input into the system.
Participant	This section allows you to enter information about the participants in the various programs.
Single Service	The Single Service allows you to enter a service that occurs once.
Recurring Service	The Recurring Service allows you to enter a service that is delivered more than one time to the same set of participants.
Case Management	
Reports	
Monitor/Analysis	The "Monitor/Analysis" section allows you to use multiple choices to build a specific report to match your own unique specifications.
Service	The "Service" report section allows you to print out specific reports on services that have already been entered into the system. Many of these reports have date ranges that can be tailored to the user's needs.
Administrative	The Administrative Reports section has reports that can give a user some cumulative information on staff, providers, and participants.
Evaluation	The evaluation section allows users to input answers to surveys available on the system.
Individual Assessment	The Individual Assessment area allows you to put in pretest and posttest answers for participants.
Coalition	

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Coalition Activity	The Coalition Activity section allows you to enter a coalition service that occurs.
Coalition Organization Registration	This feature is where an Organization can register its coalition. Before any members can be added to the Coalition, the Organization must first register its Coalition.
Coalition Member Registration	These are the members of coalition partner's staff but are not members of the lead agency staff. The coalition staff members are entered and they can track services performed just as if they were members of the lead agency staff.
Meeting Groups	A group of all Coalition members that will be attending a specific Coalition meeting. This module is used for attendance purposes for the Coalition meetings.
Meetings	Coalition meetings are used to establish and prioritize objectives and then track the progress to meeting objectives. This module is a way of centralizing the meeting agendas and tasks.
Coalition Report	
Knowledge Base	The Knowledge Base is the area of the system used to store help information on different modules on the system and also any codes, indexes, or web resources.
Expert Help	The expert help area contains messages explaining the different modules of CADCAT and how to use them.
Library	The library drop-down list contains forms and indexes that are helpful for gathering information or can act as a reference list for inputting the correct codes into the system.
Web Sources	The Web Sources option allows the users to find a great deal of prevention web sites on the Internet.
Administration	The administration menu consolidates many of the tasks of administering accounts for CADCAT.
Organization	This area is used to set or modify information on the organization.
Staff	This area is used to register new staff or edit existing staff information.
Administrative Time	This area is used to track non-service staff time.
Change Password	This screen allows the user to change the password for the account they are currently logged in under.
KIT Support	This option opens a new browser window to the support site.
Log Off	By choosing this option, you will Exit the program and close the online session.

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Tips For Using CADCAT Effectively

CADCAT is set up in such a fashion that moving from Left to Right on the menu is the best approach to using the system. Start at Assessment, filling in all the information for that area before moving on to the Planning section. Continuing in this manner will ensure that all of the sections of the system have enough information to function correctly. If all of the different portions are not completed, some modules will not work correctly.

RECOMMENDED COMPUTER SETTINGS

Screen Resolution

You will get the best screen layout if you set your PC monitor settings to 1024 x 768 pixels or larger. If your screen resolution is smaller (ex. 800 X 600 pixels), everything on the screen will appear larger. But, if you use 800 X 600 pixels, then you will have to scroll more both up & down and left & right to access all the data fields.

Web Browser

The web browser supported by the CADCAT service is Microsoft Internet Explorer (IE). Currently Mozilla Firefox, Netscape, AOL, MSN and other browsers are not supported by PBPS. They may function, but not to design specifications. We recommend users have the latest version of IE installed on their computer along with the updates provided by Microsoft (which are released periodically).

Pop-Up Blockers

Modern computer security technology and usability features development have lead to pop-up blocking. Although this new feature of internet browsers, toolbars and other 3rd party managing software blocks hazardous and annoying pop-ups, sites like CADCAT require pop-ups to be able to function. If your pop-up blocker is enabled, then there is a possibility that CADCAT may not function or appear properly. You should either disable the pop-up blocker while using the CADCAT service (while remembering to enable it, if desired, when not in CADCAT) or create exceptions for the pop-up blocker. This is cumbersome, but may be easier than making exceptions to the pop-up blocker.

To create exceptions for the pop-up blocker, open your Internet Explorer 6.0 browser window. Once the browser is open, click the top toolbar option “Tools” and then go to “Internet Options”. After the Internet Options window is available, you will want to click on the “Privacy” tab at the top of the window. You will notice while on the “Privacy” tab, at the bottom will be a section on Pop-Up Blockers. If you’re “Block Pop-Ups” checkbox is checked, then click on the “Settings” button. You can now add the CADCAT service links to the “Allowed Sites” list which the pop-up blocker will ignore when trying to block pop-ups from CADCAT. You will want to add “https://kitprevention.kithost.net” for the live system, and “http://demo.kithost.net” for the demo system. Once these sites are added to your “Allowed Sites” list, the pop-up blocker will no longer prevent pages from loading or appearing while you are using the CADCAT service.

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MENU INFORMATION

The menu for CADCAT is located across the top of the screen. Each Main Menu category is broken down into Submenu categories to choose from.

1. Main Menu — Constant (unchanging)
2. Submenu — Vary depending on which Menu item is selected.

THE TOOLBAR

Information is entered and edited on the computer screen through data entry/edit forms. The table below summarizes the buttons used to enter/edit information. Notice that if the button is not in **bold** print (see the Save button below), then it is not selectable at this time.

Search	Searches for information on the criteria (e.g. client name) that you specify
Add	Must be pressed first before new information is added to a form
Edit	Allows you to change the information currently on the form
Save	Adds the information on the form to the KIT Prevention database
Print	Prints the information currently on the form
Help	Displays help specific to the current form
Delete	Removes the information currently on the form from the KIT Prevention database

After you press 'Add' or 'Edit', a 'Cancel' button will replace the 'Add' or 'Edit' button.

Cancel	Cancels the Add or Edit without saving any information entered.

While entering information into a form, several keys are helpful for moving the cursor from one information box (called a data field) to another. The table below summarizes those keys:

Key	Description	Function
	The TAB Key	Moves the cursor to the next data field
	Hold down the SHIFT key and then press the TAB key	Moves the cursor to the previous data field
	Use the MOUSE by pointing and clicking to move the cursor	Moves the cursor by pointing and clicking

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DATA FIELDS AND BUTTONS

In the CADCAT service there are several fields, boxes and buttons that are used to collect and store data.

Type	Preview / Description
Text Field (aka 'Text Box)	**(fill in the blank)**
Drop Down Menu (aka Pull Down Menu)	**(select one)**
Buttons	<< > < >> /\ \/
Radio Button	**Selected** **Not selected**
Check Boxes	**Selected** **Not Selected**
Red*	**A red field and an asterisk denotes a required field**
Black	**Black text denotes a suggested but optional field**

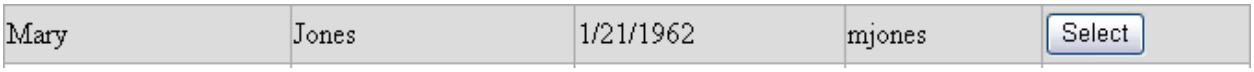
It does not matter in which order that you populate the above fields, but if a required field is not populated and you try to save the form, you will receive a message that informs you of the field vacant of data and will not be able to move to a different form until that field has data.

System Utilities

USING THE SEARCH FEATURE

When going into any area where the search option is available, the service will default the view to data that was entered previously, or blank fields if there have not been any data entered. To edit, view, or change data that has already been entered, you will need to use the Search button (located on the left toolbar) and use the following instructions to find this data.

1. The Search area has many options to order and display the data. Change the Choose Search Category to one of the options in the dropdown list to only see those categories come up in the search results or leave the setting "All Categories" to indicate that you would like to see all of the information available in the search results.
2. Click the Choose From All option to see all of the data (depending on the area you are searching) in your organization listed.
3. The Or Select a Filter option can allow you to limit search results based upon two search criteria. To change the search filters, click on the black arrow at the right-hand side of the blanks and choose an option.
4. If the Choose Search Category is set to "All Categories", the three search filters are used in the following method:
   a. The first search filter will display the search categories that you can pick from.
   b. The second search filter varies based upon the first choice.
   c. The third search filter is the criteria you are searching for (i.e. 10/20/03 as a date of a service).
5. If you use the Or Select a Filter option when the Choose Search Category is set to a specific category, only the second and third boxes will be present. Choosing a filtering means in the second box and then entering the criteria for your search in the third.
6. Once you have clicked the Choose From All option or used the Or Select a Filter option, you will see a list of data. Click the Select button next to the line that represents the data you would like to edit/view/change.



7. You will then be taken back to the previous screen. Click Edit from the left toolbar to open the record for changes. Click Save to save those changes.

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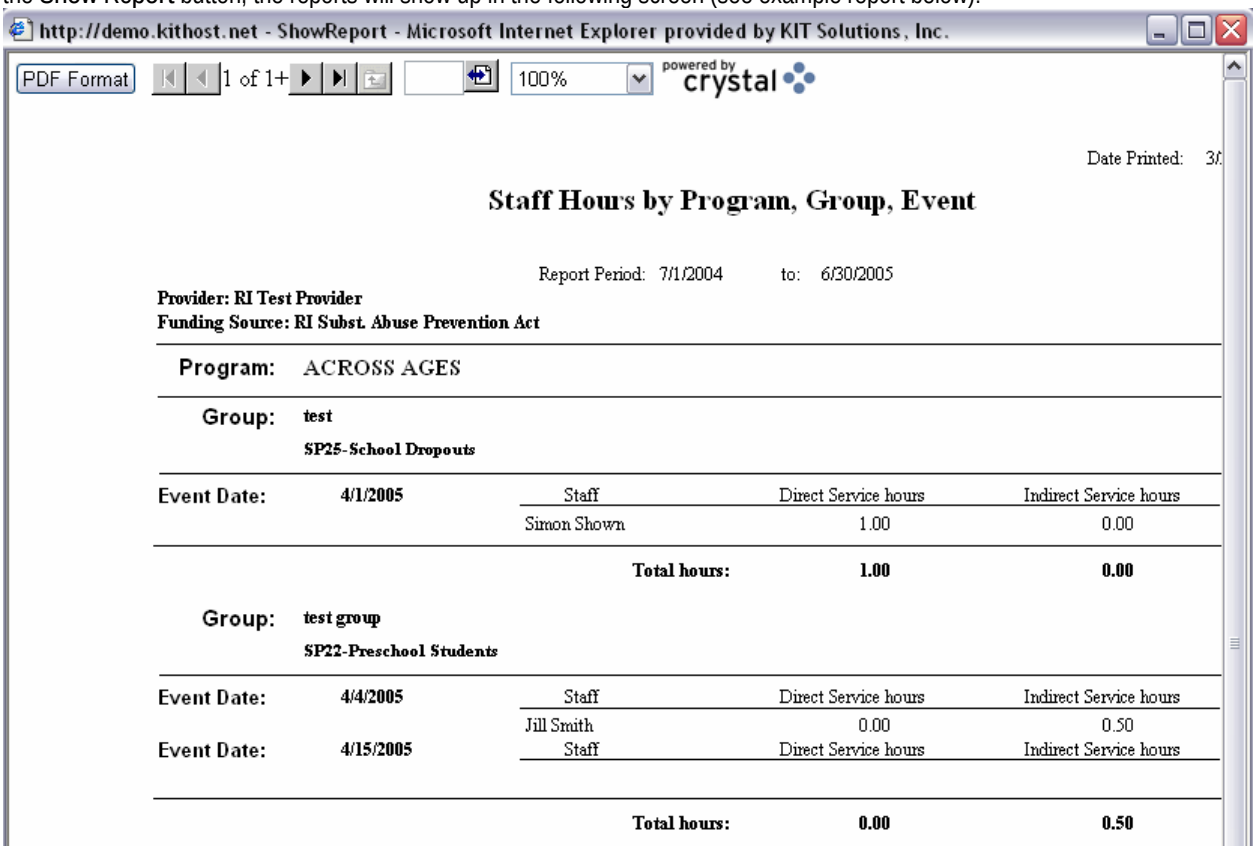
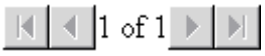
USING THE CRYSTAL REPORT VIEWER

When using reports on the CADCAT Service, reports initially are viewed using a Crystal Report Viewer. Thus, when you click the Show Report button, the reports will show up in the following screen (see example report below):



1. Once you have clicked Show Report the report will open up in a separate window.
2. Click these buttons  to maneuver to other pages in the report. The single arrow (either forward or backward, will move the view to the next page or the previous page. The arrows with the bar can move the report view to either the first or last page of the report.
3. To move to a specific page in the report, type in a page number into this field and click the button to move to that page.
4. The box with the label '100%' can be used to change the level of magnification of the report. To change the level of magnification, click the black arrow on the right side of the blank and choose an appropriate percentage.
5. The report cannot be printed from this screen. The only way to print this report is to first click the PDF Format button. The report will open up in Adobe Acrobat Reader.

   If you have already installed Adobe Acrobat Reader, it will open up the report in this same window with the Acrobat Reader. If you have not installed Adobe Acrobat Reader, the computer will prompt you asking if you would like to download the program at that time. Be aware that the program will take quite some time to download if you are connecting to the internet on a dialup connection.

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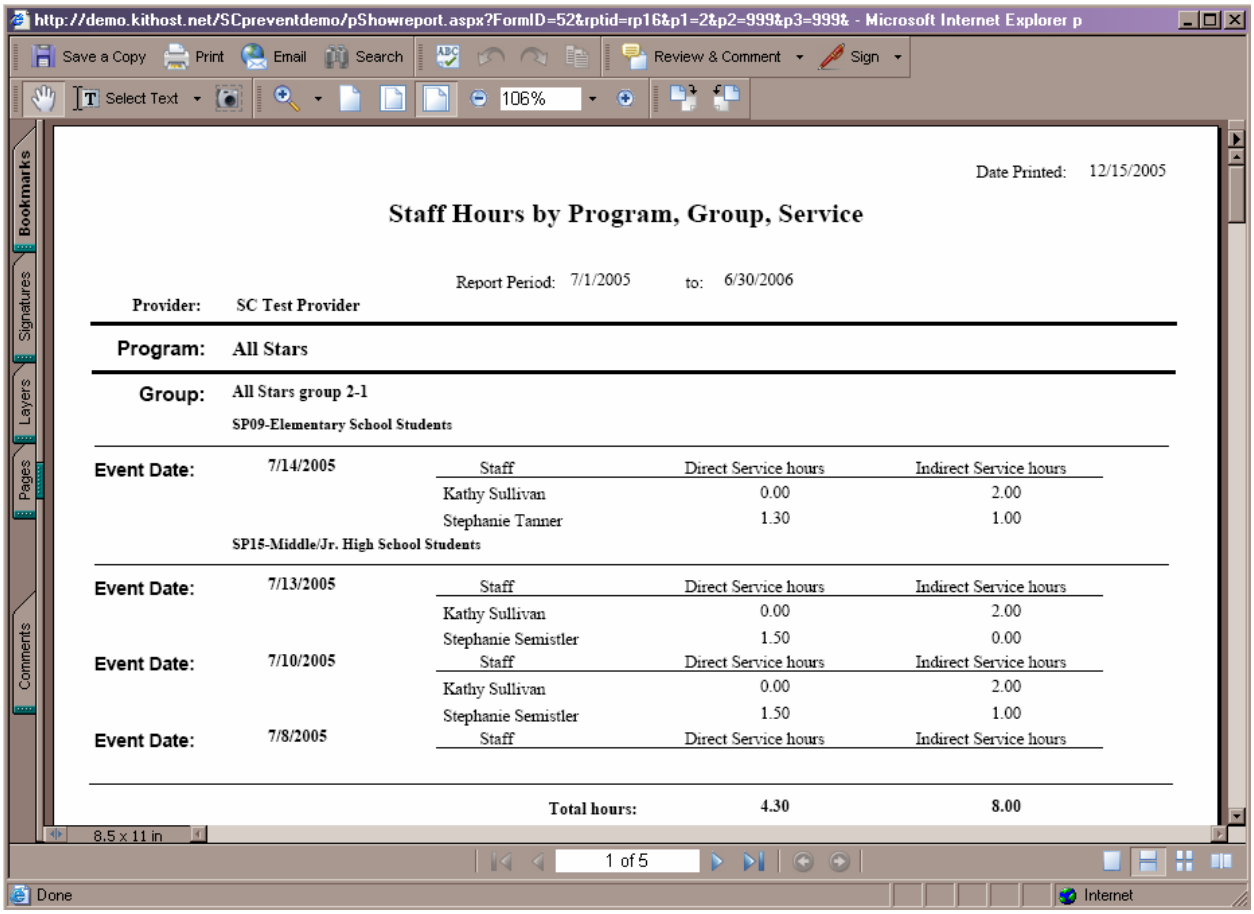

6. Once you see the report in the Adobe Acrobat Reader window, click the print button to print this report.

7. Click the disk button to save this report.

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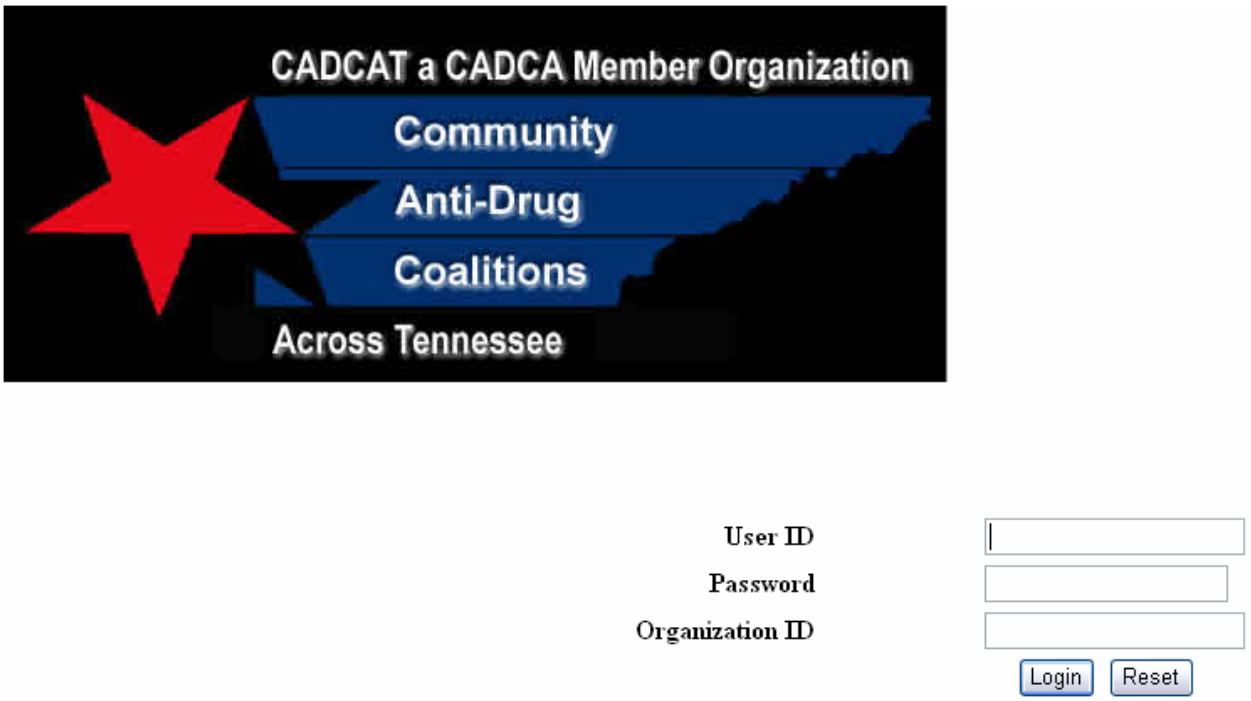
LOGIN PROCEDURE

Connect to the Internet using your Internet browser (Internet Explorer or Netscape Navigator). In the Address (Location) box, type in the following address and press enter:

https://www.kithost.net/npp

The following screen will appear:



Login into CADCAT

Type in the **Login Name**, **Password** and **Organization ID** supplied to you by your administrator.

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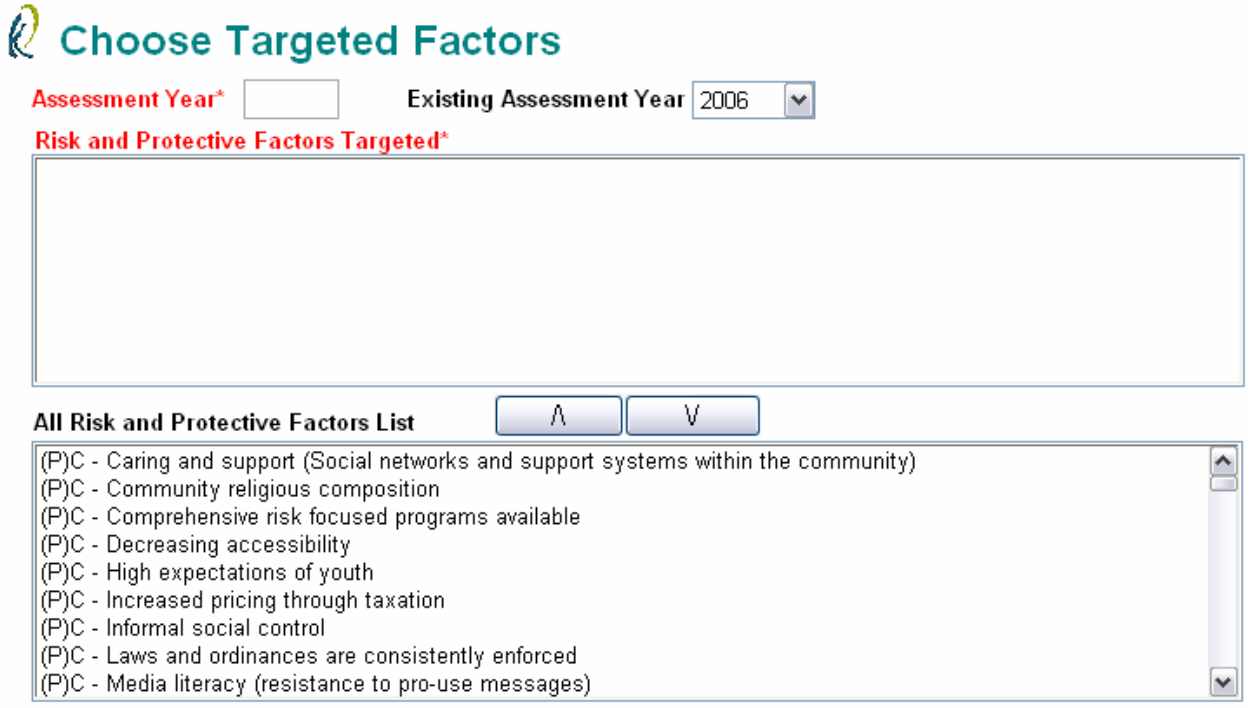
Assessment

The Assessment portion of the CADCAT service is used to evaluate the risk and protective factors that should be targeted based upon the needs of the community.

CHOOSING THE TARGETED FACTORS

You will be able to gauge the risk factors that your prevention programs should be targeting and the protective factors to counteract those risk factors. The risk and protective factors should come from your prevention planning coalition. CADCAT has an option where you can choose the risk and protective factors for the planning year. This module should have staff access limited to the Prevention Director or their designee.


Choose Targeted Factors
Assessment Year*
Existing Assessment Year
2006
Risk and Protective Factors Targeted*
All Risk and Protective Factors List
(P)C - Caring and support (Social networks and support systems within the community)
(P)C - Community religious composition
(P)C - Comprehensive risk focused programs available
(P)C - Decreasing accessibility
(P)C - High expectations of youth
(P)C - Increased pricing through taxation
(P)C - Informal social control
(P)C - Laws and ordinances are consistently enforced
(P)C - Media literacy (resistance to pro-use messages)

Enter new assessment year and then choose targeted factors.

1. Click Assessment from the menu.
2. Click Choose Targeted Factors from the submenu.
3. Click Add from the left toolbar.
4. Enter the current Assessment Year*.
5. A list of available factors are in the bottom box labeled All Risk and Protective Factors List. Click on the Risk & Protective Factors identified in your Needs Assessment. You may select as many as you need.
6. Use the arrows in the center of the screen to move items from the All Risk and Protective Factors List to the Risk and Protective Factors Targeted* list. (Use the table below for a description of the arrow buttons.)
7. The Risk and/or Protective Factor(s) you selected will be displayed in the Risk and Protective Factors Targeted* box.
    a. If you want to remove a factor from the Targeted list, simply reverse the last two instructions and click on the factor in the Targeted list, and click the down arrow.
8. Click Save from the left toolbar.

*Note: To exit this screen without saving any of the changes you have made, click Cancel.

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The following table summarizes the arrow buttons:

Button	Function
	Moves only the selected factors from the All Risk and Protective Factors List to the Risk and Protective Factors Targeted list.
	Moves only the selected staff/member from the Risk and Protective Factors Targeted list to the All Risk and Protective Factors List.

Editing Targeted Factors

1. From the Targeted Factors screen, select the current Assessment Year* from the dropdown list.
2. Click Edit from the left toolbar.
3. A list of available factors are in the bottom box labeled All Risk and Protective Factors List. Click on the Risk & Protective Factors identified in your Needs Assessment. You may select as many as you need.
4. Use the arrows in the center of the screen to move items from the All Risk and Protective Factors List to the Risk and Protective Factors Targeted* list. (Use the table above for a description of the arrow buttons.)
5. The Risk and/or Protective Factor(s) you selected will be displayed in the Risk and Protective Factors Targeted* box.
    a. If you want to remove a factor from the Targeted list, simply reverse the last two instructions and click on the factor in the Targeted list, and click the down arrow.
6. Click Save from the left toolbar.

*Note: To exit this screen without saving any of the changes you have made, click Cancel.

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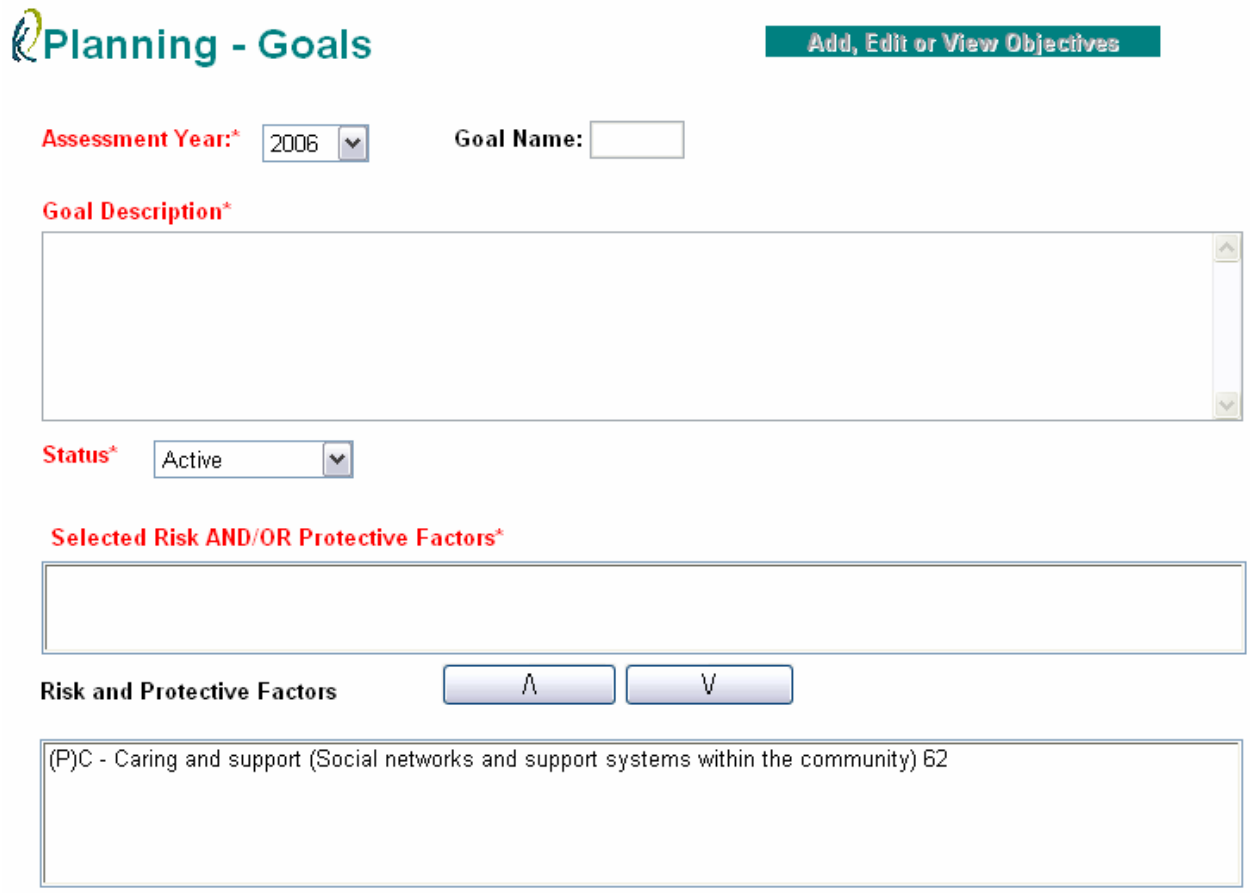
PLANNING

ENTERING GOALS



1. Click **Planning** from the main menu.
2. Click **Goals/Objectives** from the sub menu
3. Click **Add** from the left toolbar.
4. Select the current fiscal year from the Assessment Year* dropdown list.
5. Type in the description of the goal into the Goal Description*
6. Leave the Status* of the Goal as *Active.* (This feature allows you to set older Goals as *Inactive* and they would then discontinue showing up in other sections of the CADCAT Service).
7. A list of available factors are in the bottom box labeled **All Risk and Protective Factors List.** Click on the Risk & Protective Factors identified in your Needs Assessment. You may select as many as you need.
8. Use the **arrows** in the center of the screen to move items from the **All Risk and Protective Factors List** to the Risk and Protective Factors Targeted* list. (Use the table below for a description of the **arrow** buttons.)
9. The Risk and/or Protective Factor(s) you selected will be displayed in the Risk and Protective Factors Targeted* box.
   a. If you want to remove a factor from the Targeted list, simply reverse the last two instructions and click on the factor in the Targeted list, and click the down arrow.
10. Click **Save** from the left toolbar.

*Note: To exit this screen without saving any of the changes you have made, click **Cancel**.

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Editing a Goal

1. From the Planning screen, find the goal you wish to edit by clicking Search from the left toolbar. (See Using the Search Feature for information on how to search for previously entered information).
2. Once the desired goal is displayed, click Edit from the left toolbar.
3. To edit a field that has a predetermined list (i.e., it has a black down-arrow on the right end of the box), select the desired value from the list.
4. To edit a field without a predetermined list, select the field to edit by using the mouse to click inside of it. Use the Backspace and/or Arrow key to delete the unwanted characters from the field. Then type the information you want in the field.
5. Repeat steps 3-4 until all of the fields have been modified the way you want them.
6. Click Save from the left toolbar.

   *Note: To exit this screen without saving any of the changes you have made, click Cancel.

Deleting a Goal

1. From the Planning screen, find the goal you wish to delete by clicking Search from the left toolbar. (See Using the Search Feature for information on how to search for previously entered information).
2. Once the desired goal is displayed, click Delete from the left toolbar.
3. A prompt appears stating "Are you sure?" Click the OK button.
4. You are returned to the previous screen and the record has been deleted from the system.

   *Note: Clicking Cancel from the left toolbar will return you to the previous screen and not delete the record.

   *Note: If the Goal has been used in conjunction with an objective, program, or service the system will not allow you to delete the goal until everything associated with the goal has been deleted..

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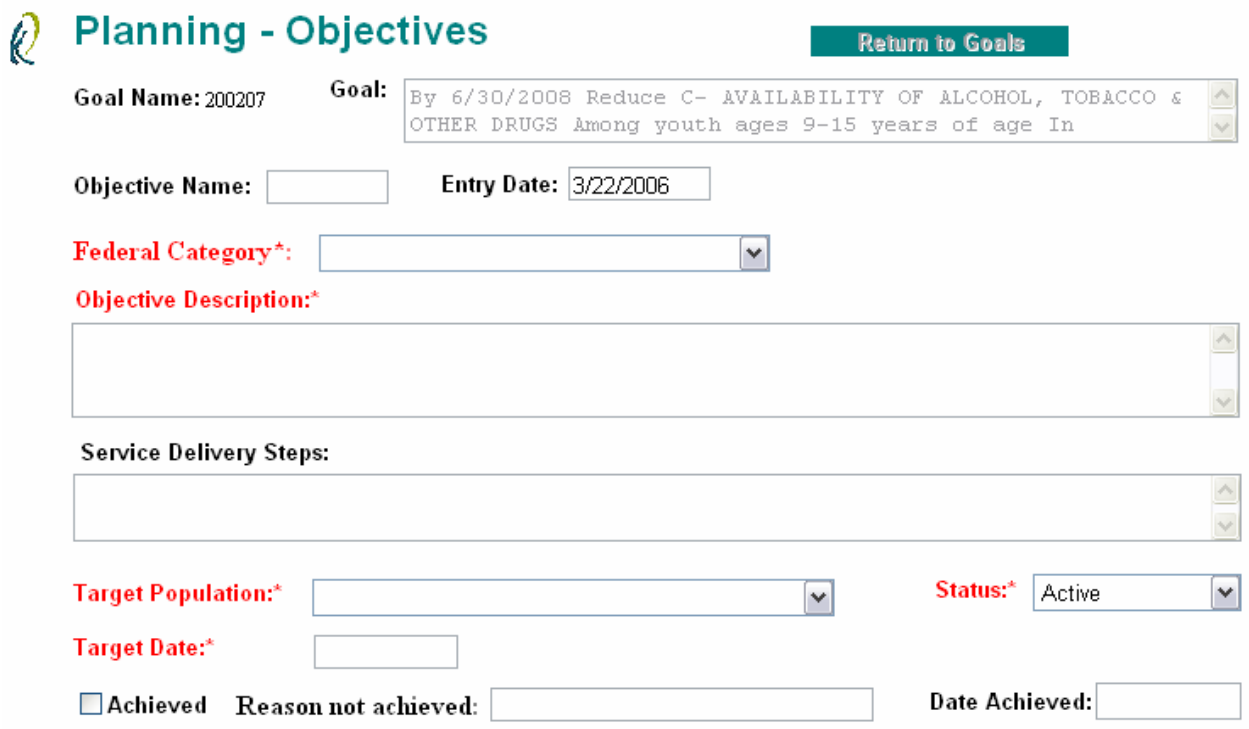
ENTERING OBJECTIVES

Once you have followed the steps for Entering Goals, the button Add, Edit, or View Objectives will be active. Click on this button to add, edit, or view an Objective for a desired Goal. The Objectives page is set up exactly the same as the Goals page.



1. Click Planning from the main menu.
2. Click Goals/Objectives from the sub menu.
3. Find the goal you wish to add an objective to by using the Search Utility. (See Using the Search Feature for information on how to search for previously entered information).
4. Click the Add/Edit/View Objectives button.
5. Click Add from the left toolbar.
6. The Goal is filled in for you based on the choice from Goal screen.
7. Choose a Federal Category* from the dropdown list.
8. Type in the Objective Description* for the objective. (This short description will be the information displayed in a dropdown list in the Program section to choose the objective to tie to the particular program).
9. Choose a Target Population* from the dropdown list.
10. Type in the Target Date* for this objective.
11. Leave the Status* of the objective as Active (this feature allows you to set older goals as inactive and they will not show up in other sections of CADCAT).
12. Click Save from the left toolbar.

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Editing a Objective

1. From the Planning screen, find the objective you wish to edit by clicking Search from the left toolbar. (See Using the Search Feature for information on how to search for previously entered information).
2. Once the desired objective is displayed, click Edit from the left toolbar.
3. To edit a field that has a predetermined list (i.e., it has a black down-arrow on the right end of the box), select the desired value from the list.
4. To edit a field without a predetermined list, select the field to edit by using the mouse to click inside of it. Use the Backspace and/or Arrow key to delete the unwanted characters from the field. Then type the information you want in the field.
5. Repeat steps 3-4 until all of the fields have been modified the way you want them.
6. Click Save from the left toolbar.

   *Note: To exit this screen without saving any of the changes you have made, click Cancel.

Deleting a Objective

1. From the Planning screen, find the objective you wish to delete by clicking Search from the left toolbar. (See Using the Search Feature for information on how to search for previously entered information).
2. Once the desired objective is displayed, click Delete from the left toolbar.
3. A prompt appears stating "Are you sure?" Click the OK button.
4. You are returned to the previous screen and the record has been deleted from the system.

   *Note: Clicking Cancel from the left toolbar will return you to the previous screen and not delete the record.

   *Note: If the Objective has been used in conjunction with an objective, program, or service the system will not allow you to delete the goal until everything associated with the goal has been deleted.

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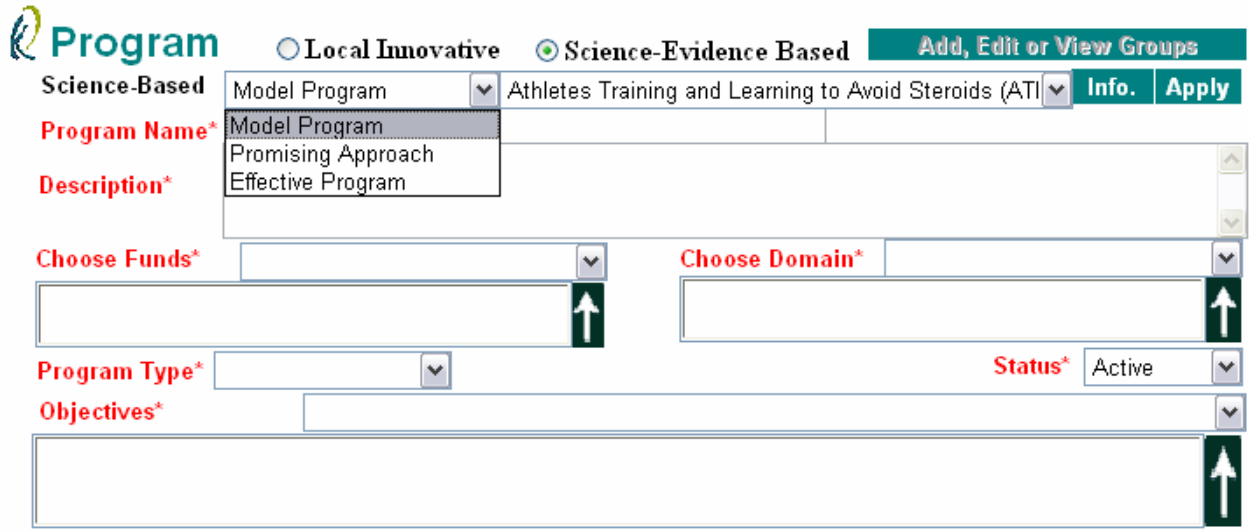
Program

You may either choose a model or evidence-based program or add a program of your own.

ADDING A SCIENCE-BASED PROGRAM



1. Click **Program** from the menu.
2. Click **Program** from the submenu.
3. Click **Add** from the left toolbar.
4. Choose **Science-Evidence Based** as your program type.
5. Choose which type of program you want to add (*Model*, *Effective*, *Promising*) from the **Science-Based** dropdown list.
6. Choose the **Program** from the dropdown list.
    a. If you want to obtain detailed information about the program, click on the **Info** button.
    b. Click on the **Apply** button.
7. The Program Name* and Program Description* will be filled in for you.
8. Select your funds from the Choose Funds* dropdown list. You can select multiple entries for the **Funding**.
    a. To remove one of the funds from the list, click on the fund and then click the arrow pointing up to return it to the Choose Funds* list
9. Select your domain from the Choose Domain* dropdown list. You can select multiple entries for the **Domain**.
    a. To remove one of the domains from the list, click on the domain and then click the arrow pointing up to return it to the Choose Domain* list.
10. Select the Program Type* from the dropdown list.
11. The Status* box should be left as *Active* to allow for this program to show up in the program lists for other parts of the KIT Prevention Service.
12. Select the Objective* to link to this program. Repeat this process to add more objectives to the program.
    a. To remove one of the objectives, click on the objective and then click on the arrow pointing up to return it to the Objective*list.
13. Click **Save** from the left toolbar.

*Note: To exit this screen without saving any of the changes you have made, click **Cancel**.

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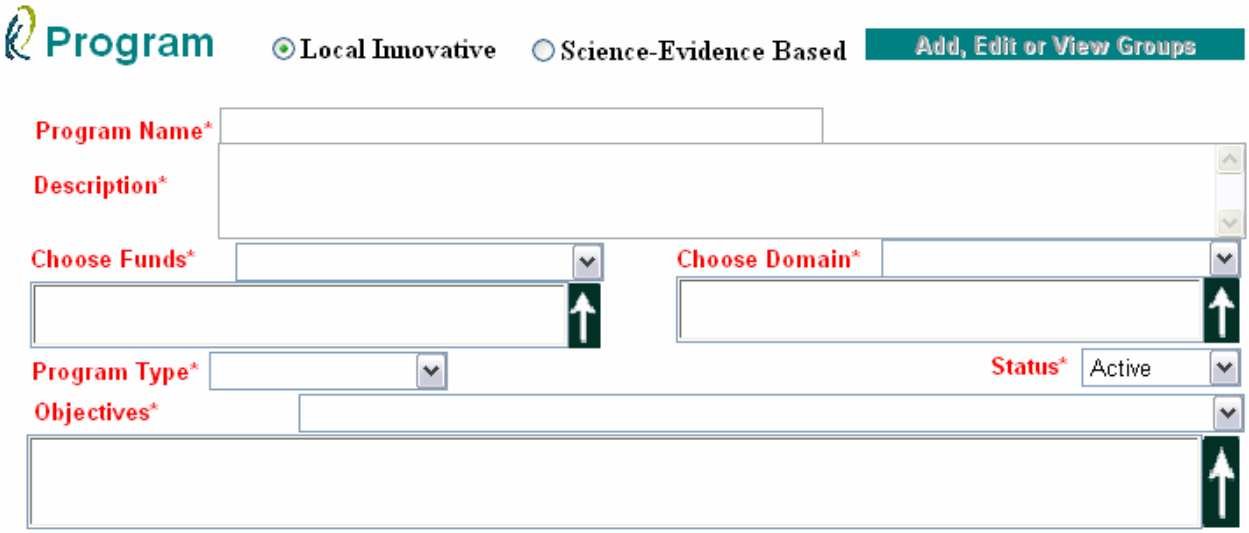
ADDING A LOCAL PROGRAM



1. Click Program from the menu.
2. Click Program from the submenu.
3. Click Add from the left toolbar.
4. Choose Local Innovative as your program type.
5. Type in the Program Name*.
6. Type in the Description* of the program.
7. Select your funds from the Choose Funds* dropdown list. You can select multiple entries for the Funding.
    a. To remove one of the funds from the list, click on the fund and then click the arrow pointing up to return it to the Choose Funds* list
8. Select your domain from the Choose Domain* dropdown list. You can select multiple entries for the Domain.
    b. To remove one of the domains from the list, click on the domain and then click the arrow pointing up to return it to the Choose Domain* list.
9. Select the Program Type* from the dropdown list.
10. The Status* box should be left as *Active* to allow for this program to show up in the program lists for other parts of the KIT Prevention Service.
11. Select the Objective* to link to this program. Repeat this process to add more objectives to the program.
    a. To remove one of the objectives, click on the objective and then click on the arrow pointing up to return it to the Objective*list.
12. Click Save from the left toolbar.

*Note: To exit this screen without saving any of the changes you have made, click Cancel.

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Editing a Program

1. Choose Program from the main menu.
2. Find the program you wish to edit by using the Search Utility. (See Using the Search Feature for information on how to search for previously entered information).
3. Click Edit.
4. Make any changes that are needed.
5. Click Save.
   *Note: To disregard changes at anytime – click on the Cancel button.

Deleting a Program

1. Choose **Program** from the main menu.
2. Find the program you wish to delete by using the **Search** Utility. (See Using the Search Feature for information on how to search for previously entered information).
3. Click **Delete.**
4. Click **OK** when asked "Are you sure?".
   ***Note:** If you do not wish to delete this entry, click the **Cancel** button.

   ***Note:** If the Program has been used in conjunction with a service, the system will not allow you to delete the program until everything associated with the program has been deleted.

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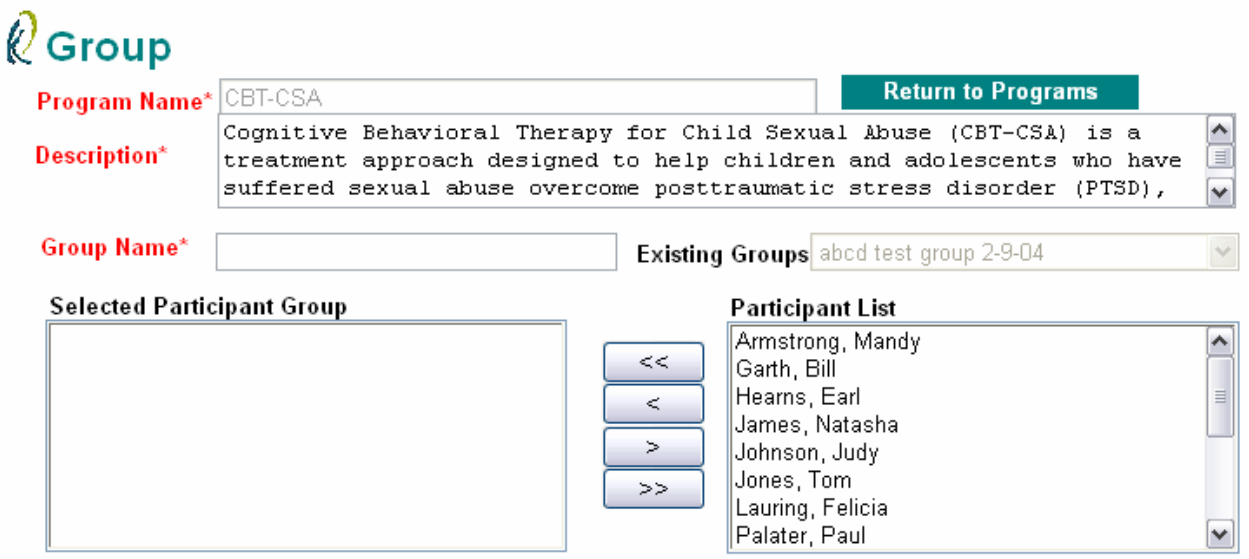
REGISTERING GROUPS FOR RECURRING ACTIVITIES

To use participants in recurring events, the participants will need to be assigned to a group and this group will need to be assigned to a program. The following section will show you how to enter a group from the Program area. Even if you have not entered the participant's names into the system yet, you can still set up the group and go back in later and use the data edit button to add the participants into the group.

Once you have saved a program, and would like to assign participants to this program, you must assign a group to a program for the program to appear in the Recurring Activities section.



1. From the **Program** screen, find the program you wish to add a group to by clicking **Search** from the left toolbar. (See Using the Search Feature for information on how to search for previously entered information).
2. Once the desired program is displayed, click the **Add, Edit, or View Groups** button.
3. Click **Add** from the left toolbar.
4. The Program Name* and Description* are already filled in for you.
5. Type in a Group Name*.
6. Using the **Participant List**, move the participants to be part of the group to the **Selected Participants** List using the arrow buttons. (See the table below for a description of the arrow buttons.)

   *Note: If participants have not been registered yet, see Registering Participants.
7. Click **Save** from the left toolbar.

   *Note: To exit this screen without saving any of the changes you have made, click **Cancel**.

The following table summarizes the arrow buttons:

Button	Function
<<	Moves all participants from the **Participant List** to the **Selected Participant Group**.
<	Moves only the selected participant from the **Participant List** to the **Selected Participant Group**.
>>	Moves all participants from the **Selected Participant Group** to the **Participant List**.
>	Moves only the selected participant from the **Selected Participant Group** to the **Participant List**.

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Editing a Group

1. From the Group screen, use the Existing Groups dropdown list to locate a group that has already been entered into the system.
2. Once the desired group is displayed, click Edit from the left toolbar.
3. To edit a field that has a predetermined list (i.e., it has a black down-arrow on the right end of the box), select the desired value from the list.
4. To edit a field without a predetermined list, select the field to edit by using the mouse to click inside of it. Use the Backspace and/or Arrow key to delete the unwanted characters from the field. Then type the information you want in the field.
5. Repeat steps 3-4 until all of the fields have been modified the way you want them.
6. Click Save from the left toolbar.

   *Note: To exit this screen without saving any of the changes you have made, click Cancel.

Deleting a Group

1. From the Group screen, use the Existing Groups dropdown list to locate a group that has already been entered into the system.
2. Once the desired group is displayed, click Delete from the left toolbar.
3. A prompt appears stating "Are you sure?" Select the OK button.
4. You are returned to the previous screen and the record has been deleted from the system.

   *Note: Clicking Cancel from the left toolbar will return you to the previous screen and not delete the record.

*Note: You will NOT be able to delete a Group if it is used in conjunction with a service. You must first delete the services before deleting the Group. (See Deleting a Service Activity for instructions.)

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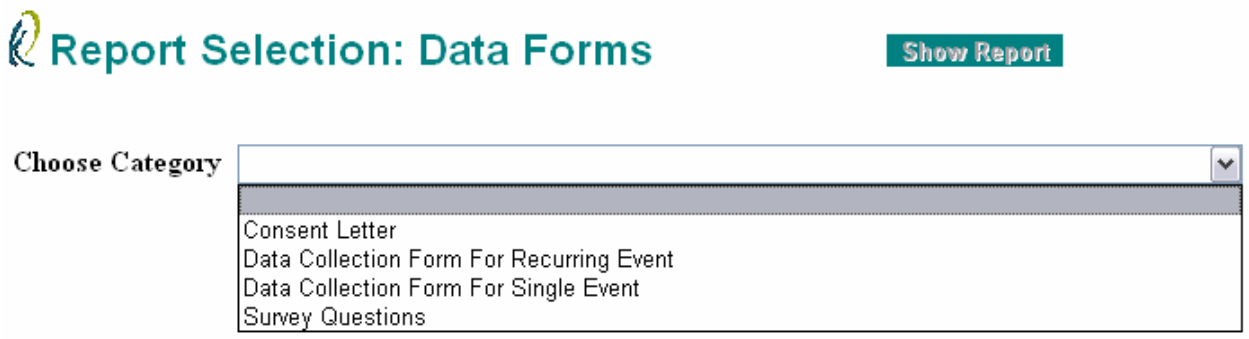
Activities

DATA COLLECTION FORMS

The Data Collection Forms area is an archive of forms that can be used to collect data during services for input into the system. This area of the system works as follows:

1. Click **Activities** from the main menu.
2. Click **Data Collection Forms** from the submenu.
   *Note: You can also access these forms from the **Print Data Collection Form** button located on each of the **Activity** screens.
3. Select the appropriate form from the **Choose Category** dropdown list
4. The form will open in a new window.



*Note: If you need help saving or printing out this form, see the Using the Crystal Report Viewer section.

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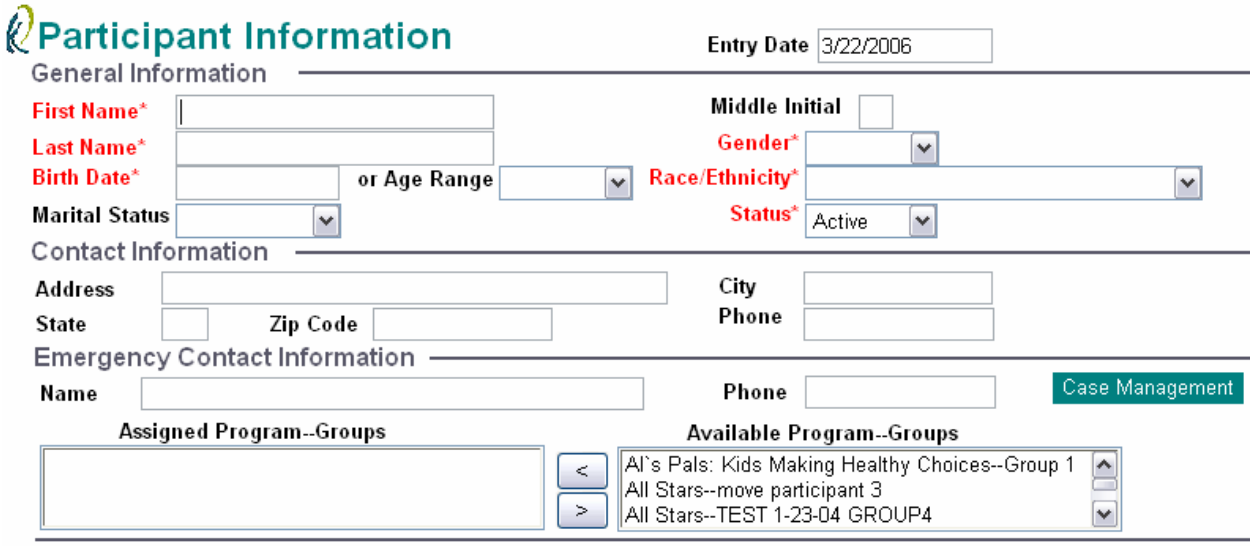
REGISTERING PARTICIPANTS

For recurring services, you will track the attendance of the individual participants instead of providing a count of the attendees. Thus, you will need to enter these individuals into the system before you enter the group for recurring service. Under the **Activity** area, there is an option called **Participant** where you can register the individuals before you begin entering the details of the recurring service.

After this section we will go into entering recurring services and how you mark the attendance of the participants (in other words, marking them as 'yes' they attended the event or 'no' they did not). In that section, you will see how you can enter participants as you are marking them for attendance, in case you forgot to add one.



1. Click **Activities** from the main menu.
2. Click **Participant** from the submenu.
3. Click **Add** from the left toolbar.
4. Type in the participant's First Name* and Last Name*.
5. If you know the participant's **Middle Initial**, you can type it in here.
6. Choose the participant's Gender*.
7. Enter in the participant's Birth Date*. (Use either format: MM/DD/YY or MM-DD-YY.)
    a. You can also use the **Age Range** dropdown list directly to the right of the **Birth Date** field. Once you click on the black down-arrow, a list will appear showing different age ranges. Select an age range and the service will *automatically fill in a birth date within the age range* (the date is estimated from today's date).
8. Choose the participant's Race*.
9. Keep the Status* dropdown set to *Active* (the Status for a participant can be set to *Inactive* if you are running a program for longer than one year and you need to clear the participant list of any individuals that are no longer part of any new recurring activities.
10. If you know the participant's **Contact Information** and **Emergency Contact Information**, you can fill them in into the appropriate fields.
11. To assign the participant to a group you have already registered in the Group section, click one of the **Available Program—Groups** and click the **up arrow**. (Use the table below for a description of the **arrow** buttons.)
    *Note: To take a participant out of a group, click the group name from the **Assigned Program – Groups** list and click the **down arrow**.
12. Click **Save** from the left toolbar.
    *Note: To exit this screen without saving any of the changes you have made, click **Cancel**.

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The following table summarizes the arrow buttons:

Button	Function
<	Moves only the selected participant from the **Participant List** to the **Selected Participant Group**.
>	Moves only the selected participant from the **Selected Participant Group** to the **Participant List**.

Editing a Participant

1. From the **Participant Information** screen, find the participant you wish to edit by clicking **Search** from the left toolbar. (See Using the Search Feature for information on how to search for previously entered information).
2. Once the desired participant is displayed, click **Edit** from the left toolbar.
3. To edit a field that has a predetermined list (i.e., it has a black down-arrow on the right end of the box), select the desired value from the list.
4. To edit a field without a predetermined list, select the field to edit by using the mouse to click inside of it. Use the Backspace and/or Arrow key to delete the unwanted characters from the field. Then type the information you want in the field.
5. Repeat steps 3-4 until all of the fields have been modified the way you want them.
6. Click **Save** from the left toolbar.

   *Note: To exit this screen without saving any of the changes you have made, click **Cancel**.

Deleting a Participant

1. From the **Participant Information** screen, find the participant you wish to delete by clicking **Search** from the left toolbar. (See Using the Search Feature for information on how to search for previously entered information).
2. Once the desired participant is displayed, select **Delete** from the left toolbar.
3. A prompt appears stating **"Are you sure?"** Select the **OK** button.
4. You are returned to the previous screen and the record has been deleted from the system.

   *Note: Clicking **Cancel** from the left toolbar will return you to the previous screen and not delete the record.

*Note: You will NOT be able to delete a participant if it is used in conjunction with a service or assessment. You must set these individuals to *Inactive* instead of deleting them.

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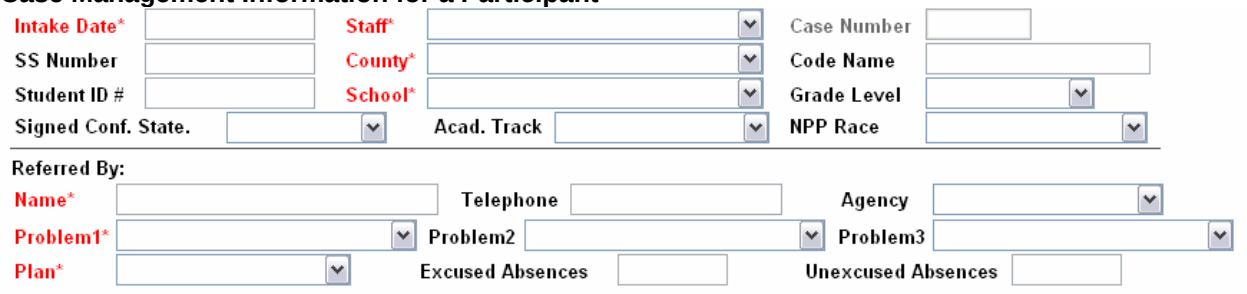
Case Management Information for a Participant



1. From the **Participant** Screen, click the **Case Management** button.
   *Note: If you add case management to a participant at a later date, click **Edit** after you find the participant you wish to add case management to by using the **Search** Utility. (See Using the Search Feature for information on how to search for previously entered information).
2. Type in the Intake Date*. (Use either format: MM-DD-YY or MM/DD/YY).
3. Choose the Staff* member from the dropdown list.
4. Choose the County* from the dropdown list.
5. Choose the School* from the dropdown list.
6. Fill in the appropriate Referral information in the **Referred By:** section.
   a. Type in the Name*.
   b. Choose the Problem1* from the dropdown list.
   c. Chose the Plan* from the dropdown list.
7. Click **Save** from the left toolbar.

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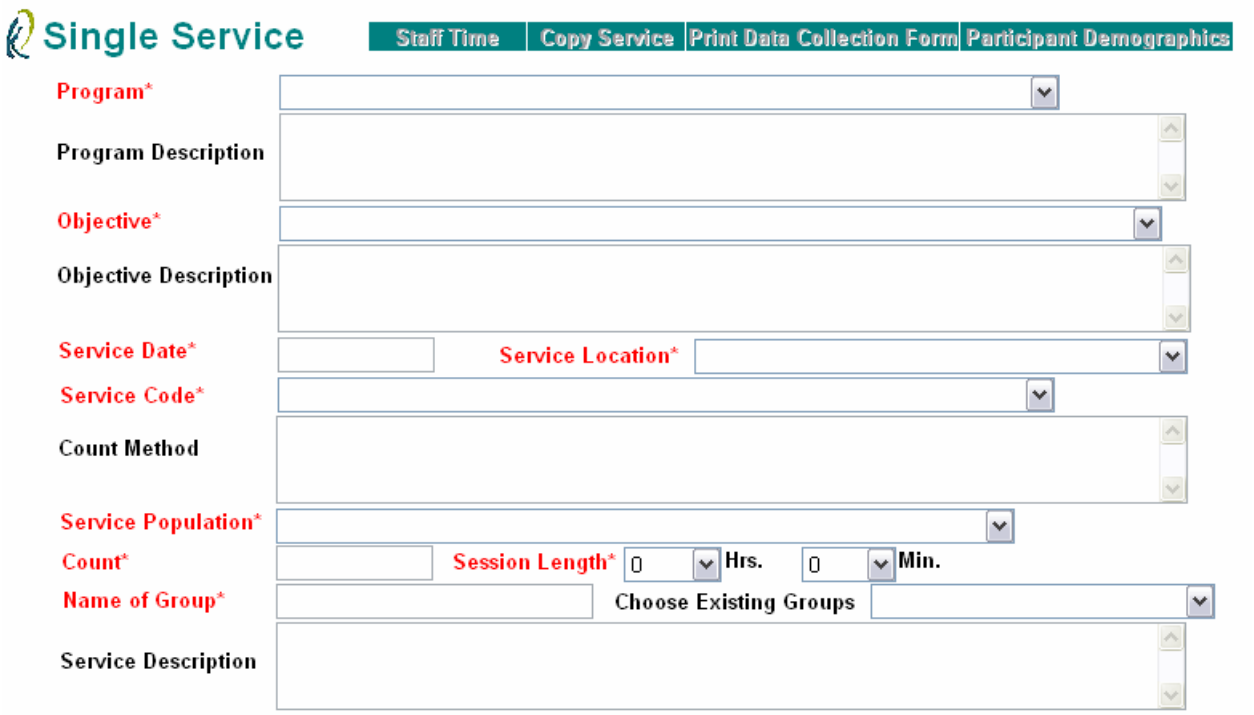
ENTERING A SINGLE SERVICE

Definition of Single Services:
Federal MDS Definition: A single service that, through the practice or application of recognized prevention strategies, is intended to inform or educate general and specific populations about substance use or abuse.
General Definition: A prevention service provided to different groups, possibly large groups, of participants in one session. The topic could be the same or different.
Example: On January 29, 2001, you sponsored a drug-free dance at a local High School for students in grades 9-12. The dance ran from 7-10 p.m. and 150 students were present.



1. Click Activities from the main menu.
2. Click Single Service from the submenu.
3. Click Add from the left toolbar.
4. Select the correct Program* from the dropdown list.
   *Note: The Program Description will automatically be filled in for you.
5. Select the appropriate Outcome Objective* from the dropdown list. You can select multiple entries for the Objective.
   a. To remove one of the Outcome Objectives from the list, click on the objective and then click the Remove button to return it to the Outcome Objective* list.
6. Enter the date of the service in the Service Date* field. (Use either format: MM/DD/YY or MM-DD-YY.)
7. Choose a Service Location* from the dropdown list to indicate what county the activity took place.
8. Choose a Service Code* from the dropdown list.
   *Note: The Count Method will automatically fill in for you.
9. Select the appropriate Service Population* from the dropdown list.
10. Fill in the Count* field with the appropriate number of attendees or other measure specified by the Service Code/Count Method.
11. Fill in the Session Length* field for the number of hours and minutes the event lasted.
12. Fill in the Name of Group* (if new), or select the Name of Group* from the Choose Existing Groups dropdown list (if the group was already created).
    *Note: The Name of Group is a short phrase which can be used to identify the individuals that attended the event.

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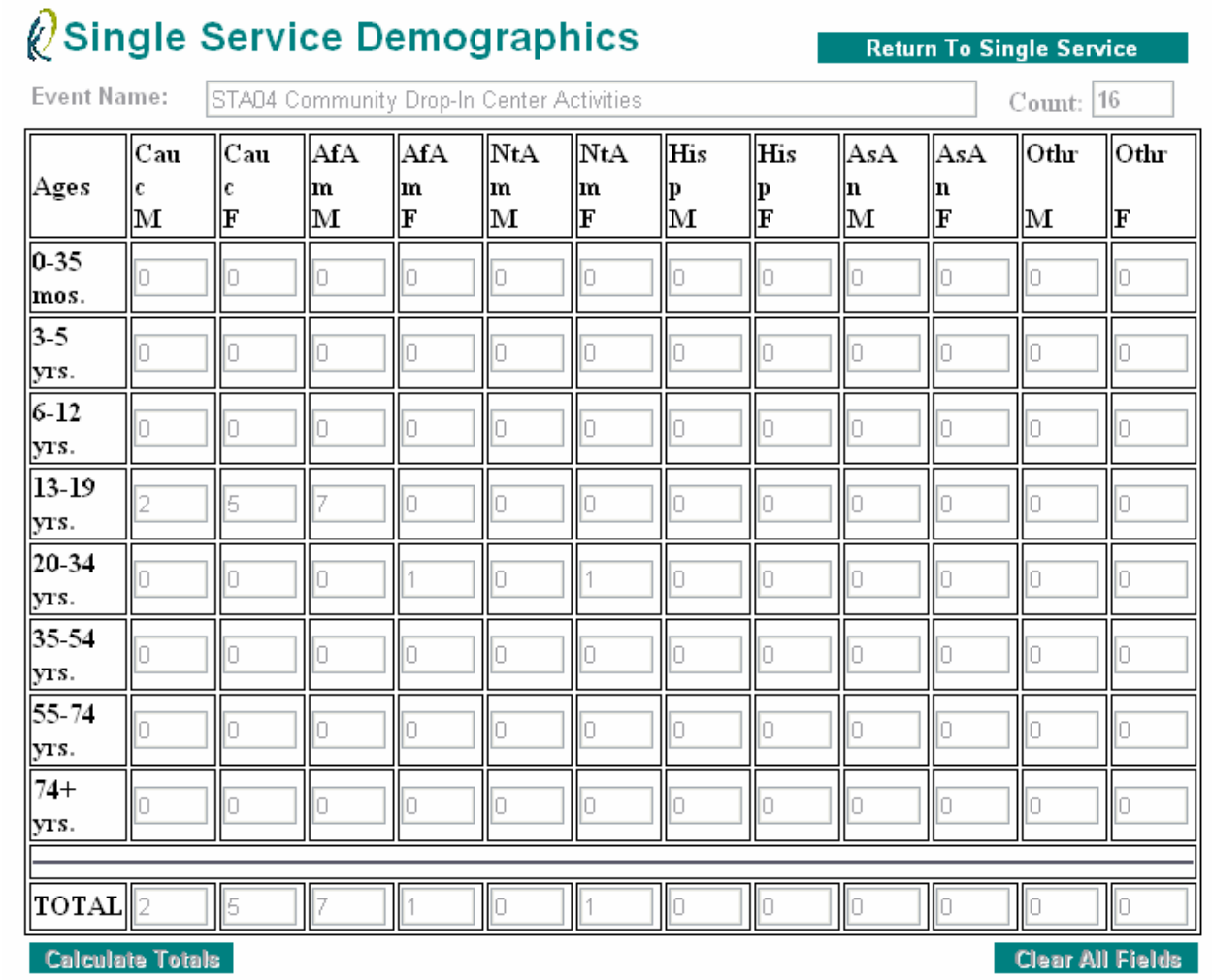
13. If desired, enter a description of the service in the **Service Activity** field.
14. Click **Save** from the left toolbar.
    *Note: To exit this screen without saving any of the changes you have made, click **Cancel**.

*Note: You must enter Staff Time after saving a Single Service. (For more information on entering staff time, see Entering Staff Service Time.)

Single Service Participant Demographics



1. After you have entered and saved a single service, you will need to enter your participant demographics.
2. Once the service is saved, click the **Participant Demographics** button.
3. Click the **Add** button, to begin entering demographic information for the Single Service.
4. Enter the **Count** value; this is the number of participants that attended the service.
5. The demographic chart details the participants are: **Male** or **Female**, and **Age of the clients** of the Participants.
6. After you are done entering demographic information for the activity, click the **Save** button to save the record. Or click **Cancel**, to cancel the request and not save it.

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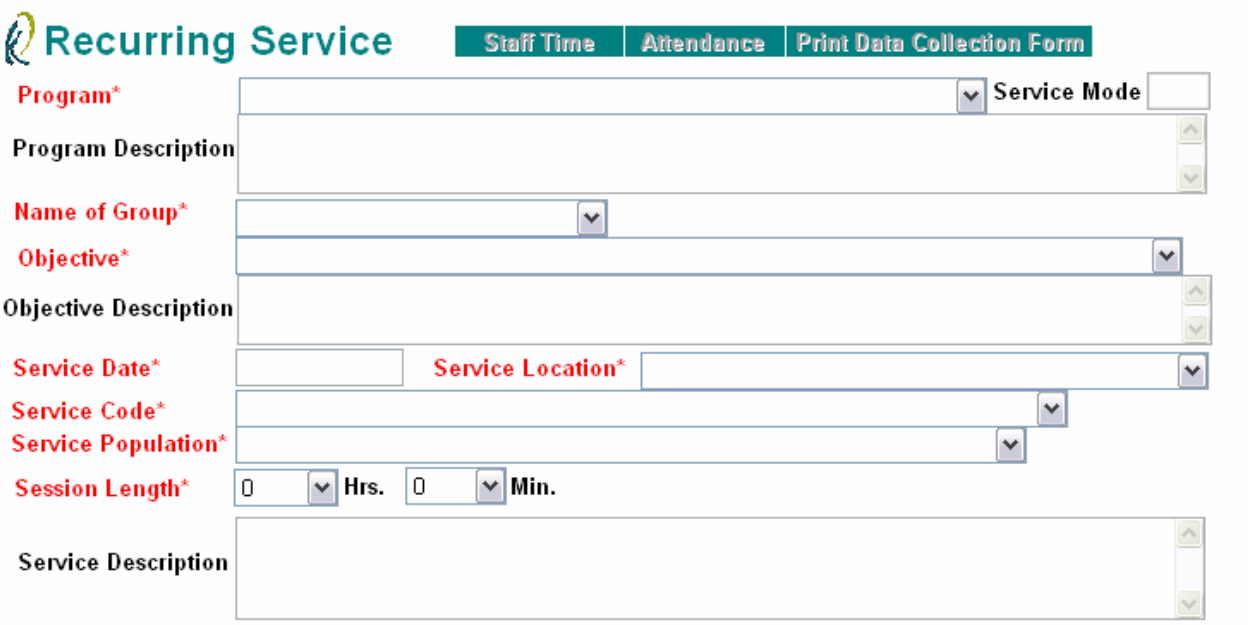
ENTERING A RECURRING SERVICE

Definition of Recurring Services:
Federal MDS Definition: A planned and recurring sequence of multiple, structured services that, through the practice or application of recognized prevention strategies, is intended to inform, educate, develop skills, deliver services, and/or provide referrals to other services to enrolled participants at risk for substance use or abuse.
General Definition: A prevention service provided to the same, small group of participants on topics (could be the same or different) in multiple sessions. *If an event does not meet this definition, enter the activity as a single service.*
Example: On February 18, 2001, you delivered a seminar for peer leaders. This was the first of 4 meetings with this same group of individuals.



1. Click Activities from the main menu.
2. Click Recurring Service from the submenu.
3. Click Add from the left toolbar.
4. Select the correct Program* from the dropdown list.
   *Note: The Program Description will automatically be filled in for you.
5. Select the group from the Name of Group* dropdown list.
   *Note: The Group was created in the Program module.
6. Select the appropriate Objective* from the dropdown list. You can select multiple entries for the Objective.
   a. To remove one of the Objectives from the list, click on the objective and then click the Remove button to return it to the Objective* list.
7. Enter the date of the service in the Service Date* field. (Use either format: MM/DD/YY or MM-DD-YY.)
8. Choose a Service Location* from the dropdown list to indicate what county the activity took place.
9. Choose a Service Code* from the dropdown list.
10. Select the appropriate Service Population* from the dropdown list.
11. Fill in the Session Length* field for the number of hours and minutes the event lasted.
12. If desired, enter a description of the service in the Service Description field.
13. Click Save from the left toolbar.
    *Note: To exit this screen without saving any of the changes you have made, click Cancel.

*Note: You must enter Staff Time after saving a Recurring Service. (For more information on entering staff time, see Entering Staff Service Time.)

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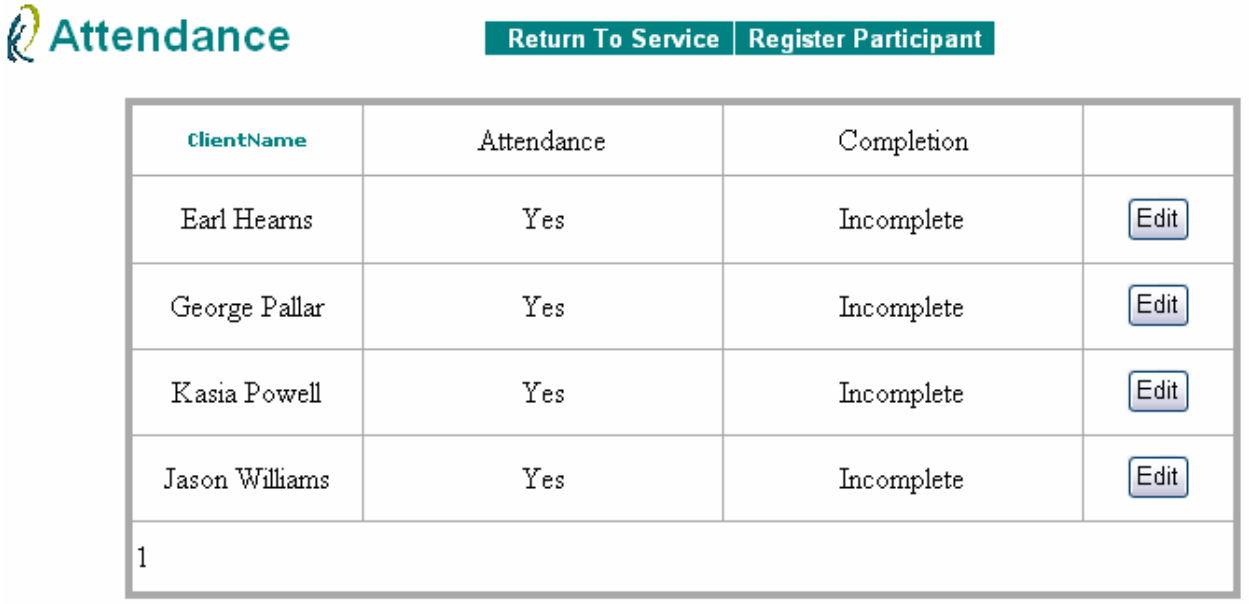
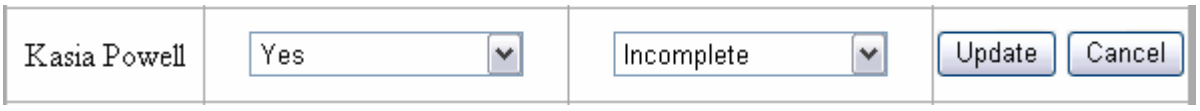
Tracking Participant Attendance

1. After clicking Save for a Recurring service, click the Attendance button.



2. To edit the attendance for a specific participant, click Edit.
3. Adjust the attendance for the participant by selecting the appropriate choice in the dropdown lists.
    a. *Attendance*: Yes or No; was this participant present?
        *Note: If you do not make any changes to attendance, your participants will all be defaulted to Yes for attendance.
    b. *Completion*: Status of this participant in the program.
        i Incomplete: future attendance is expected (default).
        ii Complete: program attendance complete, no future attendance is expected.
            *Note: Participants should not be set to Complete until the last meeting of the service.
        iii Withdrew: no longer in the program; left before the service was finished.



4. Click Update to apply any changes.
5. Click the Return To Service button to return to the service.

.

*Note: If your group has more than 10 participants, there will be more than one page of clients. In the lower left hand corner of the table with the participants names will be a small number 1, 2, 3, etc. depending on the amount of pages. Click on the numbers to change to that page number.

*Note: If you need to register a new participant for this group after the services have already begun, you can select the Register Participant button in the Participant Attendance screen. This will take you to the Participant Registration screen. Fill in all information needed to register this participant (for assistance on registering a participant, see Registering Participants). The Program-Group will already be assigned to this participant. Once all information is filled in, select Return from the left toolbar. You will be returned to the Attendance screen. Your participant has not been added to the attendance list yet. Select the participant from the Add New Participant dropdown list. Your participant is now added to the Attendance list. To edit the participant's attendance, see the above steps.

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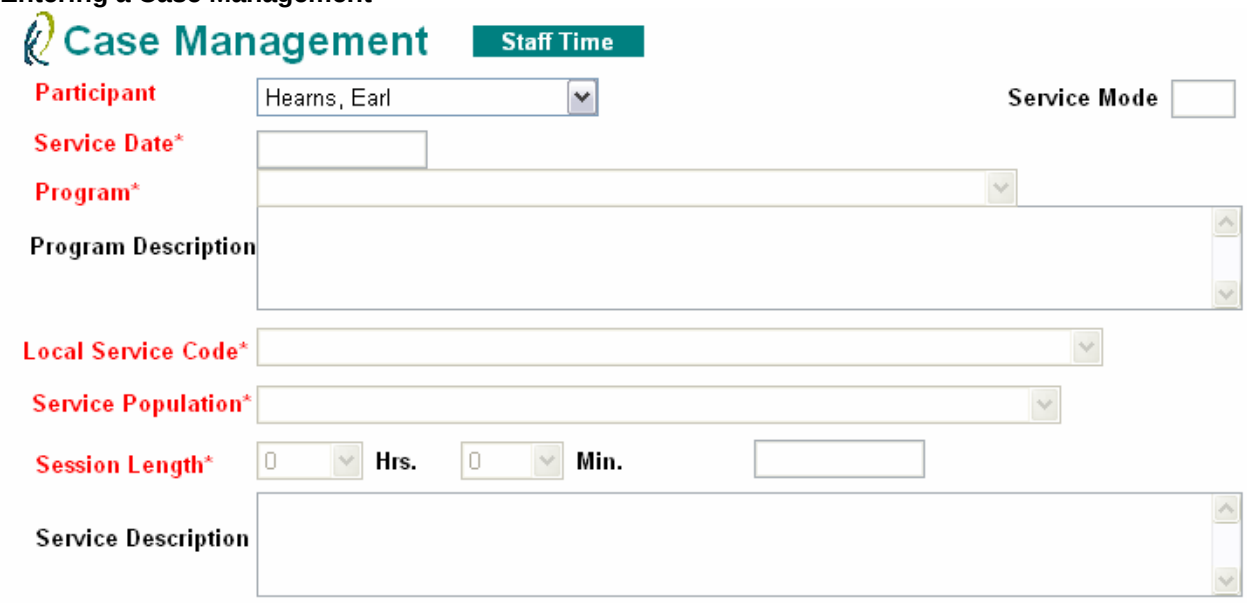
CASE MANAGEMENT

Entering a Case Management



1. Click **Activities** from the main menu.
2. Click **Case Management** from the sub menu.
3. Click **Data Entry** from the left toolbar.
4. Choose a **Participant*** from the dropdown list.
5. Type in the **Service Date***. (Use either format: MM-DD-YY or MM/DD/YY)
6. Choose a **Program*** from the dropdown list.
   *Note: The **Program Description** will automatically be filled in for you.
7. Choose the **Local Service Code*** from the dropdown list.
8. Choose the **Service Population Code*** (MDS Standard) from the dropdown list.
9. Fill in the **Session Length*** field for the number of hours and minutes the event lasted.
10. If desired, enter a description of the service in the **Service Description** field.
11. Click **Save** from the left toobar.
    *Note: To exit this screen without saving any of the changes you have made, click **Cancel**.

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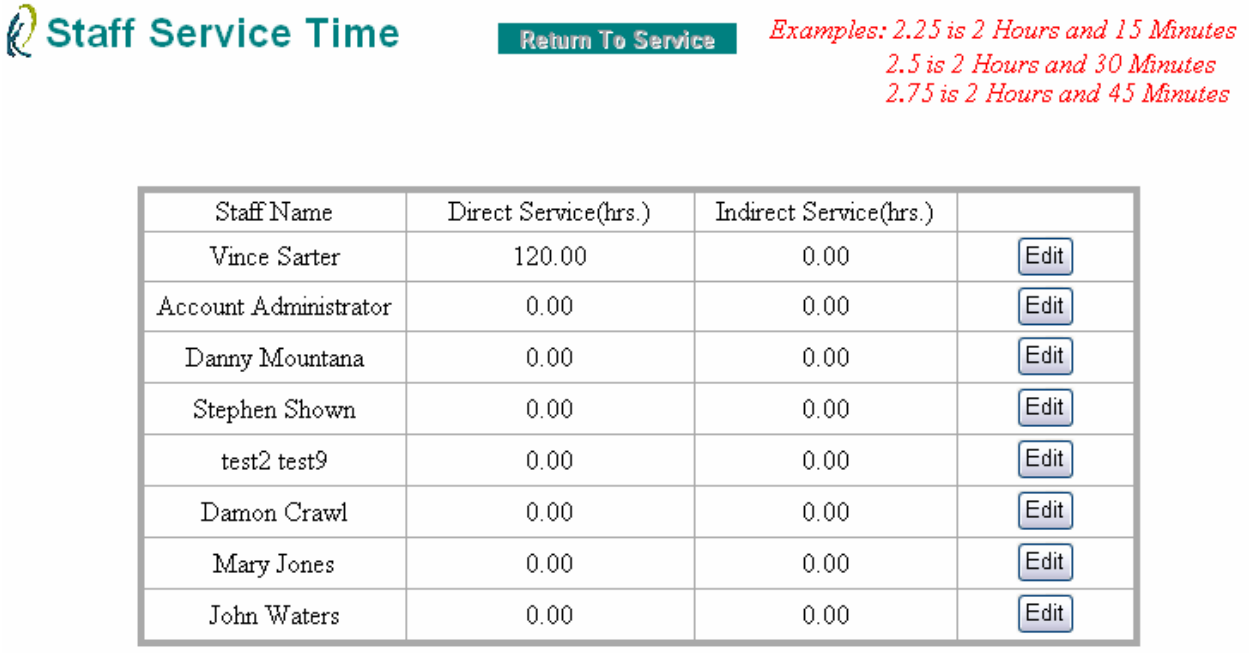
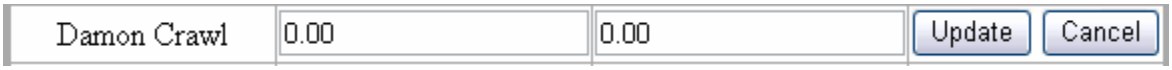
ENTERING STAFF SERVICE TIME

Staff service time that can be tied to a particular prevention service and a particular number of participants is entered from the Staff Service Time screen. This time is in the form of direct service hours (time actually performing the service) as well as indirect service hours (time spent planning, traveling, and evaluating this service). Follow the instructions below to record the staff service time.

1. After saving an Activity record, click the **Staff Time** button to enter your staff's direct or indirect service time.
   *Note: If you receive the error indicating that you have activities with no staff time, do the following steps: From the **Activities** Screen choose **Single Service** and find the service you wish to edit by using the **Search** Utility. (See Using the Search Feature for instructions.) Then select the **Staff Time** button.
2. Click **Edit** from the left toolbar.


Staff Service Time
Return To Service
Examples: 2.25 is 2 Hours and 15 Minutes
2.5 is 2 Hours and 30 Minutes
2.75 is 2 Hours and 45 Minutes
Staff Name
Direct Service(hrs.)
Indirect Service(hrs.)
Vince Sarter 120.00 0.00 Edit
Account Administrator 0.00 0.00 Edit
Danny Mountana 0.00 0.00 Edit
Stephen Shown 0.00 0.00 Edit
test2 test9 0.00 0.00 Edit
Damon Crawl 0.00 0.00 Edit
Mary Jones 0.00 0.00 Edit
John Waters 0.00 0.00 Edit

3. To record Direct Service (hrs) and Indirect Service (hrs), find the name of the person you would like add hours to, and click the **Edit** button on the right. The fields for these hours will then become open for typing. Click in the box that represents the hours you would like to change and type in a new value.



4. Click the **Update** button to save any changes or additions to a Staff member's hours.
5. Click **Save** on the left toolbar.
   *Note: To exit this screen without saving any of the changes you have made, click **Cancel**.

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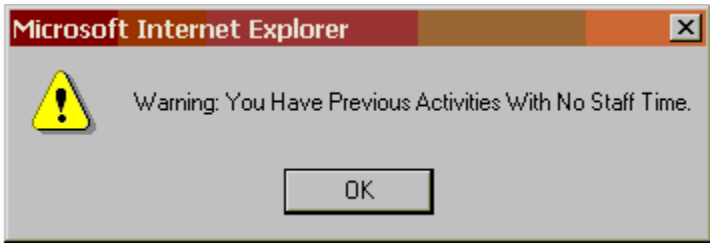
"Warning: You Have Previous Activities With No Staff Time"

If you do not enter staff time with each activity, you will get a message box each time you try to enter a new activity, informing you that you have activities with no staff time. Click Reports from the main menu. Then click Administrative from the submenu. Print the "Service Activities with Missing Staff Hours" report. This report will list all of the service activities that do not have staff service time associated with it. (For help with printing this report, see Using the Crystal Reports Viewer section.)



*Note: If you receive the error indicating that you have activities with no staff time, do the following steps:

1. From the Activity screen, find the service that has already been entered into the system that needs service time hours added by clicking Search from the left toolbar. (See Using the Search Feature for information on how to search for previously entered information).
2. Click the Staff Time button.
3. See Entering Staff Service Time for assistance with entering in the Staff Time.

USING THE COPY SERVICE BUTTON

After entering in the first event, the steps for entering successive events are even easier. Using the Copy Service button allows you to enter in your service details without having to enter all of the fields in. Once the Copy Service button is selected, most of the information is automatically brought in for you and you need to just change any of the fields that may be different. Use the steps below to utilize the Copy Service button.

1. From the Single Service screen, find a service that has already been entered into the system that is similar to the service that needs to be entered by clicking Search from the left toolbar. (See Using the Search Feature for information on how to search for previously entered information).
2. Once the desired activity is displayed in the Single Service screen, select the Copy Service button. This will begin a new record. The only field that must be filled in is Service Date. Any other information may be edited to suit this new activity.
3. To edit a field that has a predetermined list (i.e., it has a black down-arrow on the right end of the box), select the desired value from the list.
4. To edit a field without a predetermined list, select the field to edit by using the mouse to click inside of it. Use the Backspace and/or Arrow key to delete the unwanted characters from the field. Then type the information you want in the field.
5. Repeat steps 3-4 until all of the fields have been modified the way you want them.
6. Click Save from the left toolbar.

   *Note: To exit this screen without saving any of the changes you have made, click Cancel.

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Editing an Activity

1. From the Activity screen, find the service you wish to edit by clicking Search from the left toolbar. (See Using the Search Feature for information on how to search for previously entered information).
2. Once the desired activity is displayed, select Edit from the left toolbar.
3. To edit a field that has a predetermined list (i.e., it has a black down-arrow on the right end of the box), select the desired value from the list.
4. To edit a field without a predetermined list, select the field to edit by using the mouse to click inside of it. Use the Backspace and/or Arrow key to delete the unwanted characters from the field. Then type the information you want in the field.
5. Repeat steps 3-4 until all of the fields have been modified the way you want them.
6. Click Save from the left toolbar.

   *Note: To exit this screen without saving any of the changes you have made, click Cancel.

Deleting an Activity

1. From the Activity screen, find the service you wish to delete by clicking Search from the left toolbar. (See Using the Search Feature for information on how to search for previously entered information).
2. Once the desired activity is displayed, select Delete from the left toolbar.
3. A prompt appears stating "Are you sure?" Select the OK button.
4. You are returned to the previous screen and the record has been deleted from the system.

   *Note: Clicking Cancel from the left toolbar will return you to the previous screen and not delete the record.

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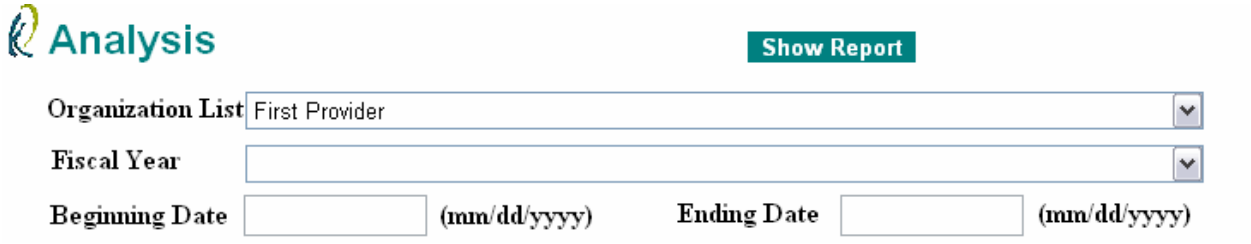
Reports

MONITOR/ANALYSIS

Use the following steps to generate a Analysis report:



1. Click Reports from the main menu.
2. Click Monitor/Analysis from the submenu.
3. You may choose to use the Fiscal Year dropdown list to auto-populate the Beginning Date and Ending Date or you may enter in a specific date range. (Use either format: MM/DD/YY or MM-DD-YY.)
4. After you fill in the date range, you can leave the options below the line set to *All*.
5. Choose either Single Events or Recurring Events for this report.

6. Click Show Report to display the Analysis report.
7. The document will open in a Crystal Report Viewer. For more information on the Crystal Report Viewer or on saving or printing the document, see Using the Crystal Report Viewer section.
8. To close the Crystal Report Viewer window, click on the ✕.

*Note: The remaining instructions are optional and you can click Show Report at any time after you have followed instructions 3 through 5 to get the Analysis report.

9. To restrict the Federal Category for this report, click the black arrow on the right side of the blank for that field and select a federal category.
10. To restrict the Target Population for this report, click the black arrow on the right side of the blank for that field and select a target population.
11. To restrict the Location for this report, click the black arrow on the right side of the blank for that field and select a location.
12. To restrict the Objective for this report, click the black arrow on the right side of the blank for that field and select an objective.
13. To restrict the Service Code for this report, click the black arrow on the right side of the blank for that field and select a service code.

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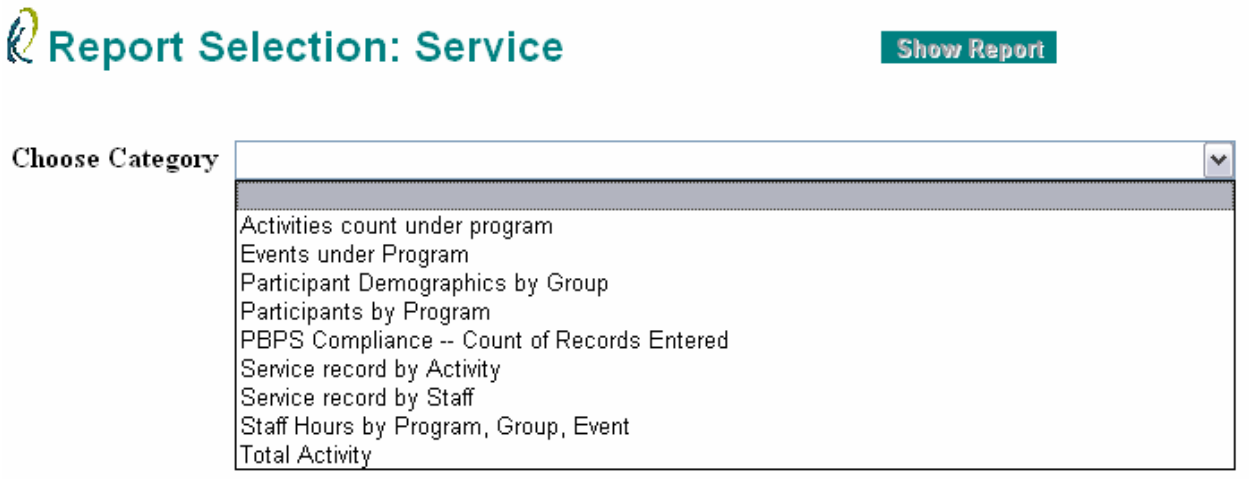
SERVICE REPORTS

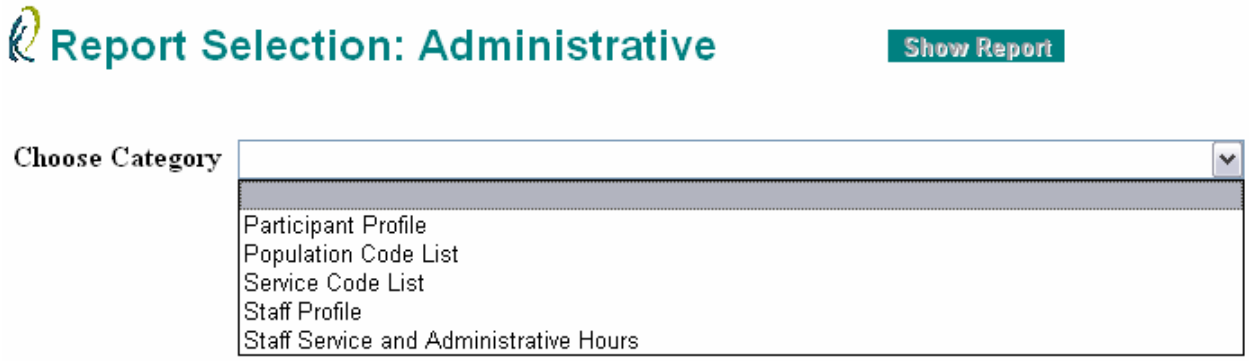
The Service reports area can be used to print reports on multiple service records, participant demographics, and staff hours. To access these reports, follow these steps:



1. Click **Reports** from the main menu.
2. Click **Service** from the submenu.
3. Select one of the reports from the **Choose Category** dropdown list.
4. If applicable, choose a **Fiscal Year** or type in a **Beginning** and **Ending Date**. (Use either format: MM/DD/YY or MM-DD-YY.)
5. Click **Show Report** to bring up a separate window with the report.
6. The document will open in a Crystal Report Viewer. For more information on the Crystal Report Viewer or on saving or printing the document, see Using the Crystal Report Viewer section.
7. To close the Crystal Report Viewer window, click on the ✕.

ADMINISTRATIVE REPORTS

The Administrative Reports section has reports that can give a user some cumulative information on staff, providers, and participants.



To access any of these reports, Click **Reports** from the main menu, then **Administrative** and choose the report that you would like to view from the **Choose Category** dropdown list. Administrative reports work in the same manner as Service Reports. If you need help saving or printing out this report, see the Using the Crystal Report Viewer section.

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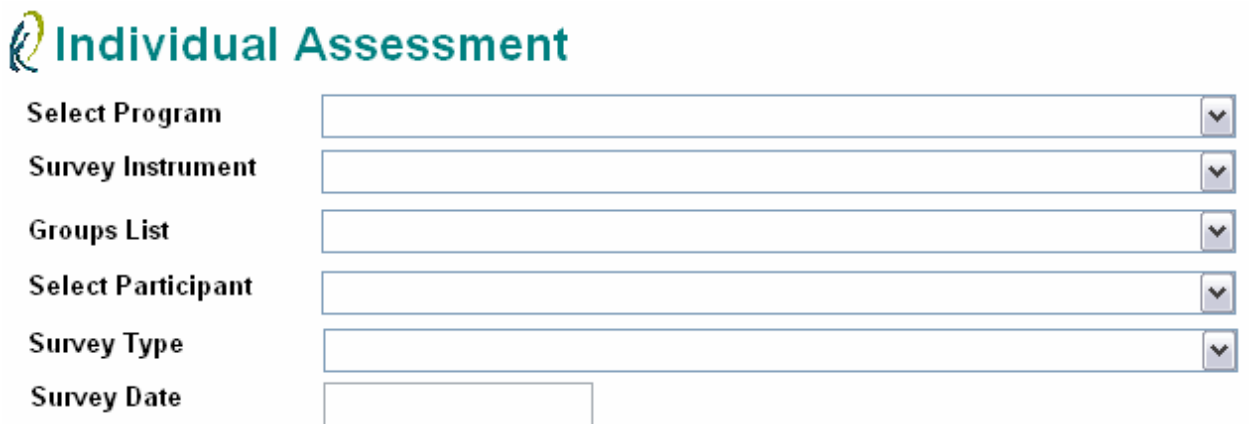
Evaluation

INDIVIDUAL ASSESSMENT

Under Evaluation, the area called Individual Assessment allows a user to input Pre-Tests and Post-Tests for a participant. After you have put in the Program, participant, and assigned a participant to a Group you will be able to go into this Individual Assessment area and fill out the surveys online.



1. Click Evaluation from the menu.
2. Click Individual Assessment from the submenu.
3. Select a program from the Select Program dropdown list.
4. Select the Survey Instrument that you are filling out for the participant.
5. Select one of the groups that have been assigned to the program you selected from the Group List dropdown.
6. From the Select Participant dropdown list, select the participant who filled out the survey.
7. Select the type of survey (pre-test, post-test, or follow-up) you will be administering from the Survey Type dropdown.
8. Enter in the Survey Date you administered the survey on.
9. Click New from the left toolbar.

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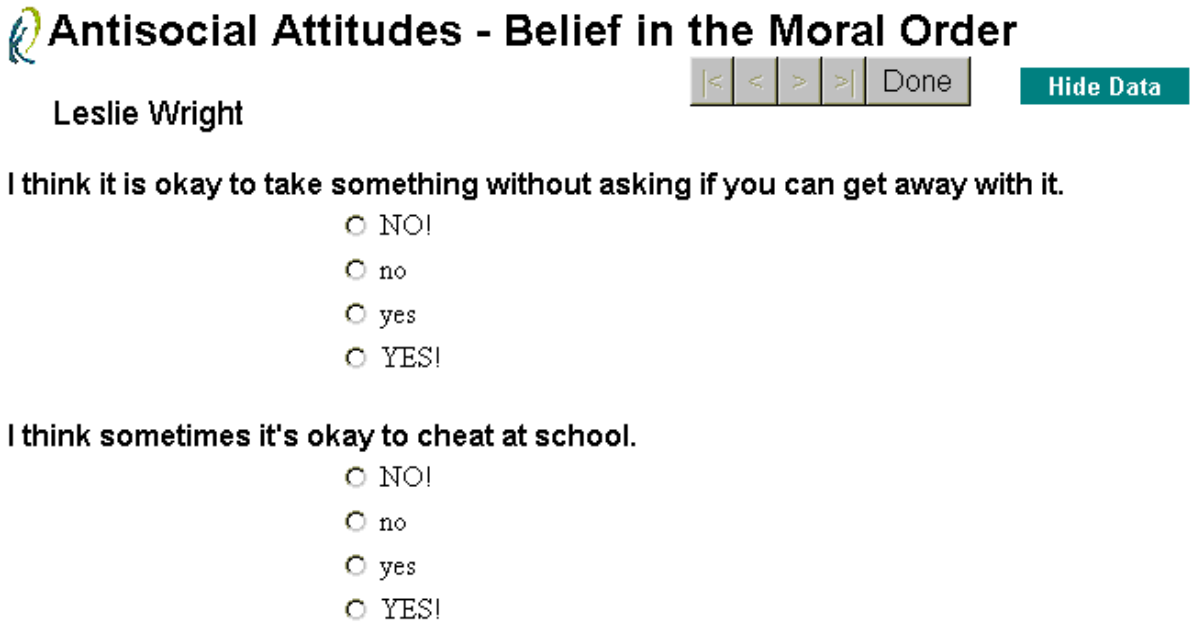

10. Once you click the New button, the survey will be available for you to input the answers.
11. Click on the Navigation Buttons |< < > >| Done to maneuver through the survey.
12. Click the Back button to go back to the Individual Assessment screen.
13. When you complete the questions, click Done.

Reviewing Individual Assessments

To review a survey that has already been entered into the CADCAT service, use the following instructions:

1. Select a program from the Select Program dropdown list.
2. Select the Survey Instrument that you are filling out for the participant.
3. Select one of the groups that have been assigned to the program you selected from the Group List dropdown.
4. From the Select Participant dropdown list, select the participant who filled out the survey.
5. Select the type of survey you want to review from the Survey Type dropdown.
6. Click Edit from the left toolbar to edit this survey or view the answers. Click the Modify Date button to modify the date you entered for this survey.
7. Click Back from the left toolbar to go back to the Individual Assessment screen.

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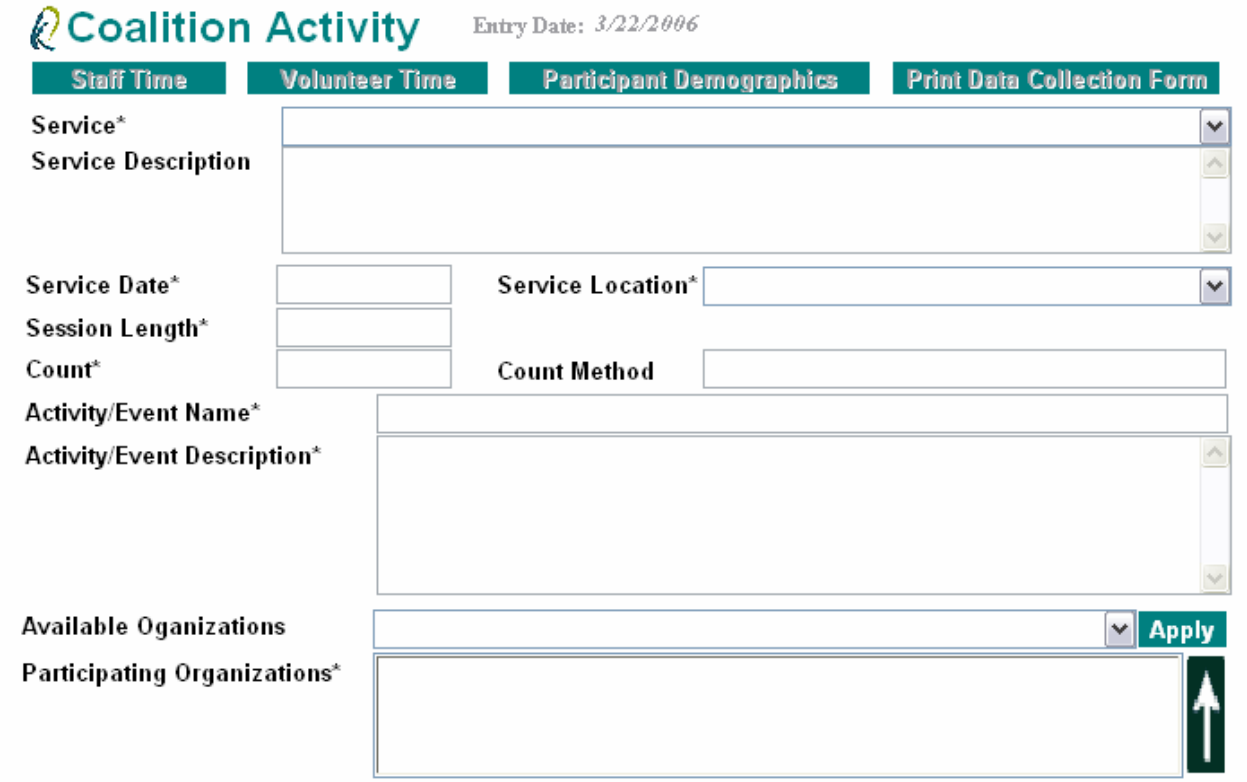
Coalition

Many prevention agencies create coalitions of prevention providers to better serve their communities. The Coalition module assists the coalitions by tracking and reporting on meeting agenda items and task progress.

COALITION ACTIVITY



1. Click Coalition from the main menu
2. Click Coalition Activity from the sub menu.
3. Click Add from the left toolbar.
4. Choose a Service from the dropdown list.
   *Note: The Service Description will automatically be filled in for you.
5. Type in the Service Date . (Use either format: MM-DD-YY or MM/DD/YY)
6. Choose the Service Location from the dropdown list.
7. Type in the Service Length of the activity.
8. Type in the Count .
9. Type in the Count Method used.
10. Type in the name of the activity in the Activity/Event Name field.
11. Type in the Activity/Event Description .
12. Click on the black arrow on the right side of the blank for Available Organizations and click on the appropriate name. Select Apply to put the organization in the Participating Organizations box.
    *Note: To remove an organization name from the Participating Organizations List, click on the name of the organization to be removed in the Participating Organizations box. Click the Right arrow to remove it.
13. Click Save from the left toolbar.

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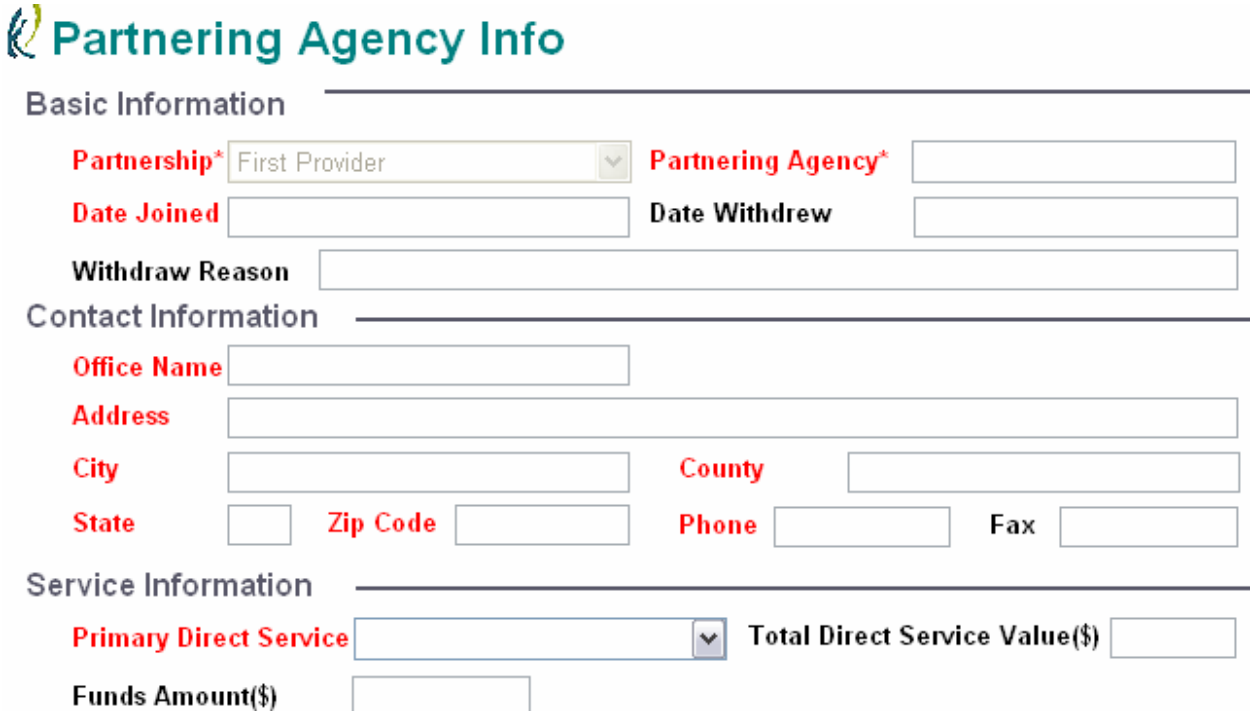
Entering Staff and Volunteer Service Time

For detailed information on how to enter staff service time or volunteer service time see Entering Staff Service Time under the Activities section of the manual.

ADDING A NEW COALITION ORGANIZATION

This feature is where an Organization can register its coalition. Before any members can be added to the Coalition, the Organization must first register its Coalition.



1. Click **Coalition** from the main menu.
2. Click **Coalition Organization Registration** from the submenu.
3. Click **Add** from the left toolbar.
4. Type in the name of the coalition in the Partnering Agency* field.
5. Enter the Date Joined*. (Use either format: MM/DD/YY or MM-DD-YY.)
6. Type in all Contact Information (Office Name*, Address*, City*, State*, County*, Zip Code*, and Phone*).

7. In the **Service Information** area, select what type of service this coalition is from the Primary Direct Service* dropdown list.
8. Fill in any optional information that is known.
9. Click **Save** from the left toolbar.

*Note: To exit this screen without saving any of the changes you have made, click **Cancel**.

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Editing a Coalition Organization

1. From the Coalition Organization Registration screen, use the Partnering Agency dropdown list to locate a coalition organization that has already been entered into the system.
2. Once the desired coalition organization is displayed, click Edit from the left toolbar.
3. To edit a field that has a predetermined list (i.e., it has a black down-arrow on the right end of the box), select the desired value from the list.
4. To edit a field without a predetermined list, select the field to edit by using the mouse to click inside of it. Use the Backspace and/or Arrow key to delete the unwanted characters from the field. Then type the information you want in the field.
5. Repeat steps 3-4 until all of the fields have been modified the way you want them.
6. Click Save from the left toolbar.

   *Note: To exit this screen without saving any of the changes you have made, click Cancel.

Deleting Staff Information

1. From the Coalition Organization Registration screen, use the Partnering Agency dropdown list to locate a coalition organization that has already been entered into the system.
2. Once the desired coalition organization is displayed, click Delete from the left toolbar.
3. A prompt appears stating "Are you sure?" Select the OK button.
4. You are returned to the previous screen and the record has been deleted from the system.

   *Note: Clicking Cancel from the left toolbar will return you to the previous screen and not delete the record.

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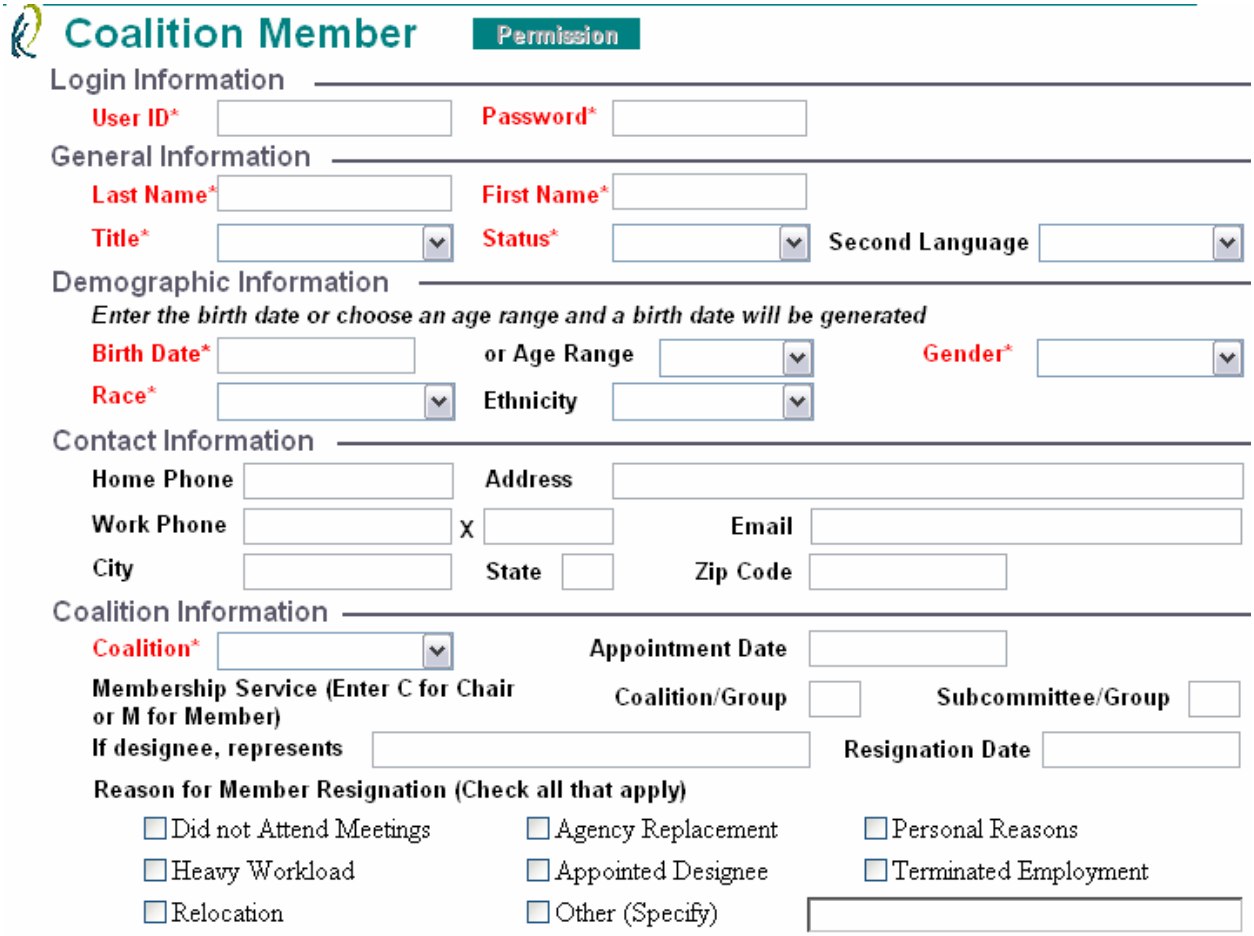
REGISTERING A NEW COALITION MEMBER

Registering a coalition partner staff member is similar to registering one of the lead agency's staff members. The coalition staff members are entered and they can track services performed just as if they were members of the lead agency staff. You can only bring up coalition members into the form and the lead agency staff will not be shown.

A coalition staff member MUST be entered if he/she will:

1. Need access to the database.
2. Be performing a prevention service.
3. Be attending coalition meetings



1. Click Coalition from the main menu.
2. Click Coalition Member Registration from the submenu.
3. Click Add from the left toolbar.
4. Enter in the member's Login Information.
    a. The User ID* will be the login name used by the member. This may be anything that you choose. Choosing a User ID and Password scheme will simplify administration. (For Example: Using first initial and last name for the User ID.)
    b. The Password* field is the password the user will type in along with the User ID and organization number to log into CADCAT. This may be anything that you choose. Once users log in themselves, they can use the Change Password area to change their own password.
5. Fill in all the required fields (i.e., any red field with an asterisk) of information for your coalition member.
6. Click Save from the left toolbar.

*Note: To exit this screen without saving any of the changes you have made, click Cancel.

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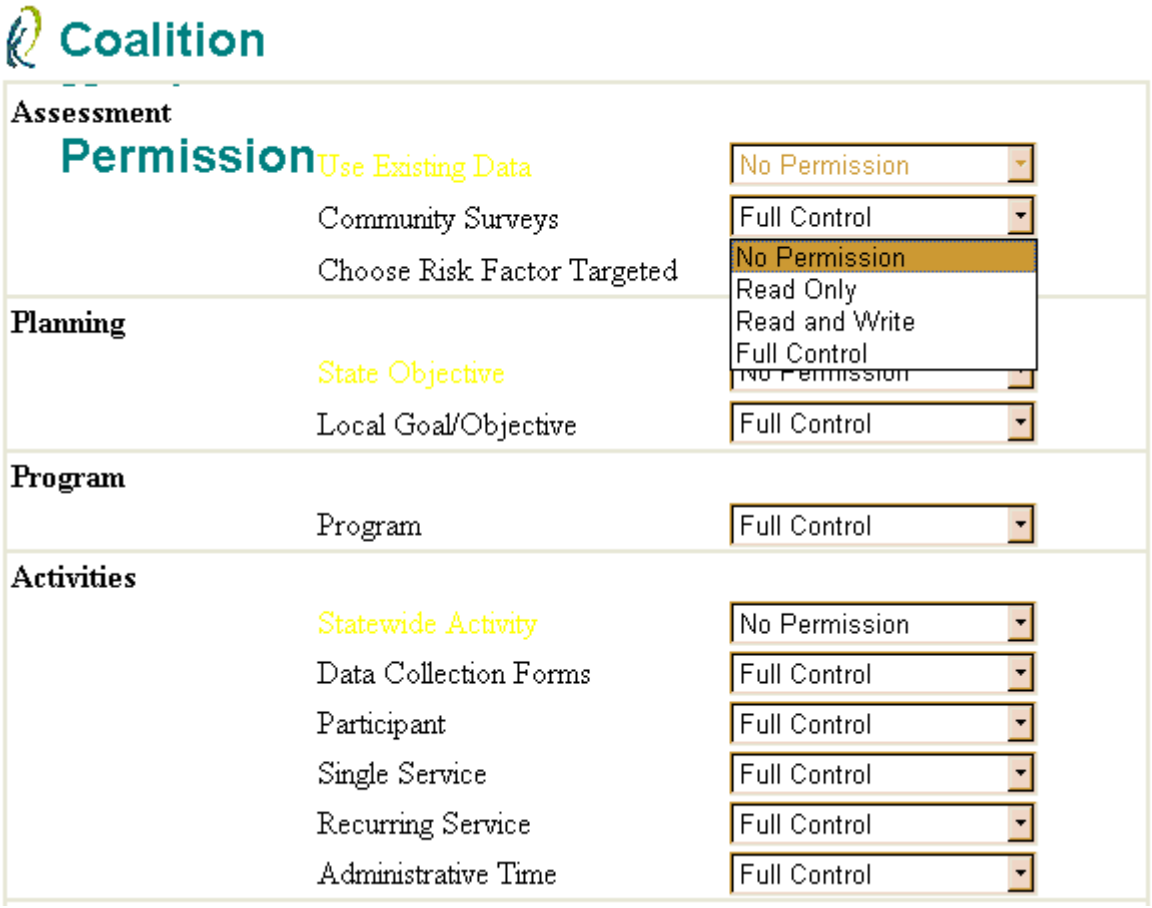
7. Click the **Permission** button once you have saved the coalition member.

Modifying Member Permissions

Once you have saved the new coalition member entry, click the **Permission** button to set the member's permissions.



(This screen shot is a partial view of the possible permissions that can be set for each area of the Service. If you were viewing this screen on the system, you would be able to scroll down to see other areas and access levels for those areas.)

You can tailor a specific user's access level to areas of the CADCAT service. The permissions are defaulted to a normal access level for a particular user, but anyone that has access to the Coalition area can modify access levels for any user on the Service. The different levels of access can be set as follows:

No Permission (Staff cannot view)
Read Only (Staff can only view information)
Read and Write (Staff can add and enter information)
Full Control (Staff can delete information)

1. Click **Data Edit** from the left toolbar to alter the permissions for the coalition member.
2. Set the permissions for the each module according to the level of permission the member should have.
3. Repeat step 2 as many times as necessary to modify any additional access levels.
4. Click **Save** from the left toolbar.
   *Note: To exit this screen without saving any of the changes you have made, click **Cancel**.
5. Click the **Back** button to return to the Coalition Member page.

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Editing Coalition Member Information

1. From the Coalition Member screen, find the member you wish to edit by clicking Search from the left toolbar. (See Using the Search Feature for information on how to search for previously entered information).
2. Once the desired member is displayed, click Edit from the left toolbar.
3. To edit a field that has a predetermined list (i.e., it has a black down-arrow on the right end of the box), select the desired value from the list.
4. To edit a field without a predetermined list, select the field to edit by using the mouse to click inside of it. Use the Backspace and/or Arrow key to delete the unwanted characters from the field. Then type the information you want in the field.
5. Repeat steps 3-4 until all of the fields have been modified the way you want them.
6. Click Save from the left toolbar.

   *Note: To exit this screen without saving any of the changes you have made, click Cancel.

Deleting Coalition Member Information

1. From the Coalition Member screen, find the member you wish to delete by clicking Search from the left toolbar. (See Using the Search Feature for information on how to search for previously entered information).
2. Once the desired member is displayed, click Delete from the left toolbar.
3. A prompt appears stating "Are you sure?" Select the OK button.
4. You are returned to the previous screen and the record has been deleted from the system.

   *Note: Clicking Cancel from the left toolbar will return you to the previous screen and not delete the record.

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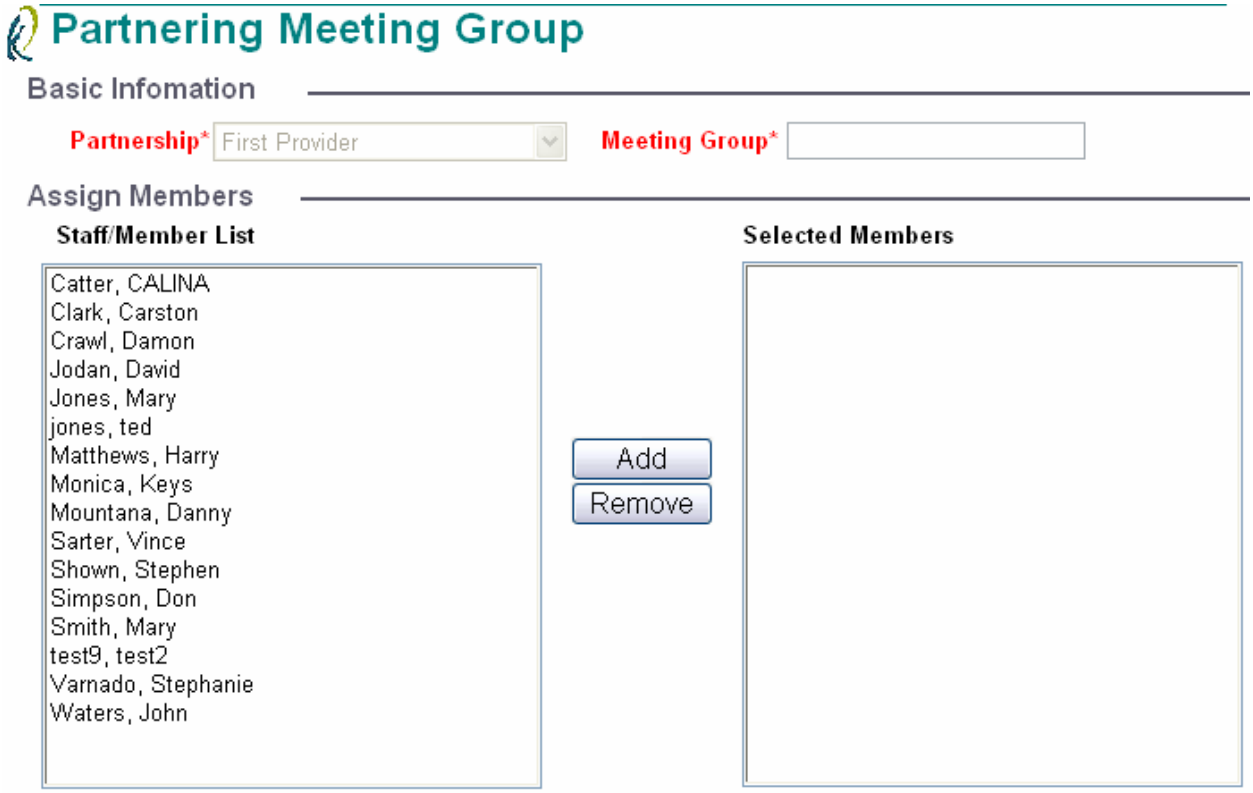
REGISTERING MEETING GROUPS

These are groups of all of the Coalition members that will be attending a specific Coalition meeting. Meeting Groups are useful because they are used to track attendance for the Coalition members and their meetings. Opposed to going through the entire list of members for each meeting, the members are now split up into logical groupings that you create for meetings.



1. Click **Coalition** from the main menu.
2. Click **Meeting Groups** from the submenu.
3. Click **Add** from the left toolbar.
4. Type in the Meeting Group* name.
5. All coalition members and staff will be displayed in the **Staff/Member List**. Use the **Add** and **Remove** buttons to add members to the **Selected Members** List. (See the table below for a description of the buttons.)
6. Click **Save** from the left toolbar.

   *Note: To exit this screen without saving any of the changes you have made, click **Cancel**.

Button	Function
Add	Moves only the selected staff/member from the **Staff/Member List** to the **Selected Members** list.
Remove	Moves only the selected staff/member from the **Selected Members** to the **Staff/Member List**.

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Editing a Meeting Group

1. From the Meeting Groups screen, use the Meeting Group dropdown list to locate a meeting group that has already been entered into the system.
2. Once the desired group is displayed, click Edit from the left toolbar.
3. To edit a field without a predetermined list, select the field to edit by using the mouse to click inside of it. Use the Backspace and/or Arrow key to delete the unwanted characters from the field. Then type the information you want in the field.
4. Repeat step 3 until all of the fields have been modified the way you want them.
5. Use the arrow buttons to add members to the Selected Members List or remove members back to the Staff/Member List. (See the table above for a description of the arrow buttons.)
6. Click Save from the left toolbar.

   *Note: To exit this screen without saving any of the changes you have made, click Cancel.

Deleting a Meeting Group

1. From the Meeting Groups screen, use the Meeting Group dropdown list to locate a meeting group that has already been entered into the system.
2. Once the desired group is displayed, click Delete from the left toolbar.
3. A prompt appears stating "Are you sure?" Select the OK button.
4. You are returned to the previous screen and the record has been deleted from the system.

   *Note: Clicking Cancel from the left toolbar will return you to the previous screen and not delete the record.

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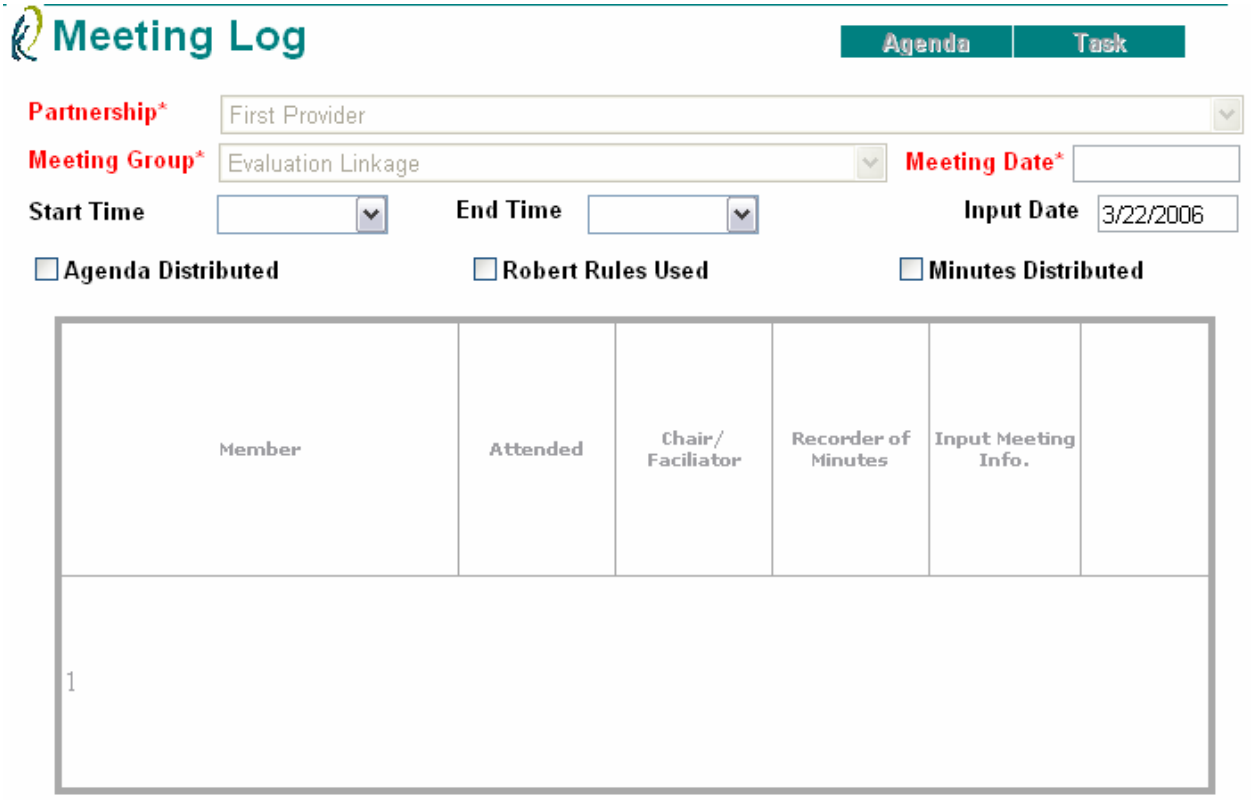
ADDING A MEETING

Coalition meetings are used to establish and prioritize goals and objectives and then track the progress to meeting those goals and objectives. This module is a way of centralizing the meeting agendas and tasks.



1. Click **Coalition** from the main menu.
2. Click **Meetings** from the submenu.
3. Choose the appropriate Meeting Group* from the dropdown list.
4. Click **Add** from the left toolbar.
5. Type in the Meeting Date*. (Use either format: MM/DD/YY or MM-DD-YY.)
6. Choose the **Start** and **End Times** from the dropdown lists.
7. Check any of the appropriate check boxes for **Agenda Distributed**, **Robert Rules Used**, or **Minutes Distributed**.
8. Click **Save** from the left toolbar.
   *Note: To exit this screen without saving any of the changes you have made, click **Cancel**.
9. All of the individuals in the chosen **Meeting Group** will be added to the meeting. To alter attendance, click **Edit** from the left toolbar. (See Editing Meetings for instructions on editing attendance.)

Editing Meetings

1. From the **Meetings** screen, use the **Meeting Group** dropdown list to locate a meeting group that has already been entered into the system.
2. Select the appropriate date from the **Meeting Date** dropdown.
   *Note: The most current date will be listed first.
3. Once the desired meeting is displayed, click **Edit** from the left toolbar.
4. To edit a field that has a predetermined list (i.e., it has a black down-arrow on the right end of the box), select the desired value from the list.

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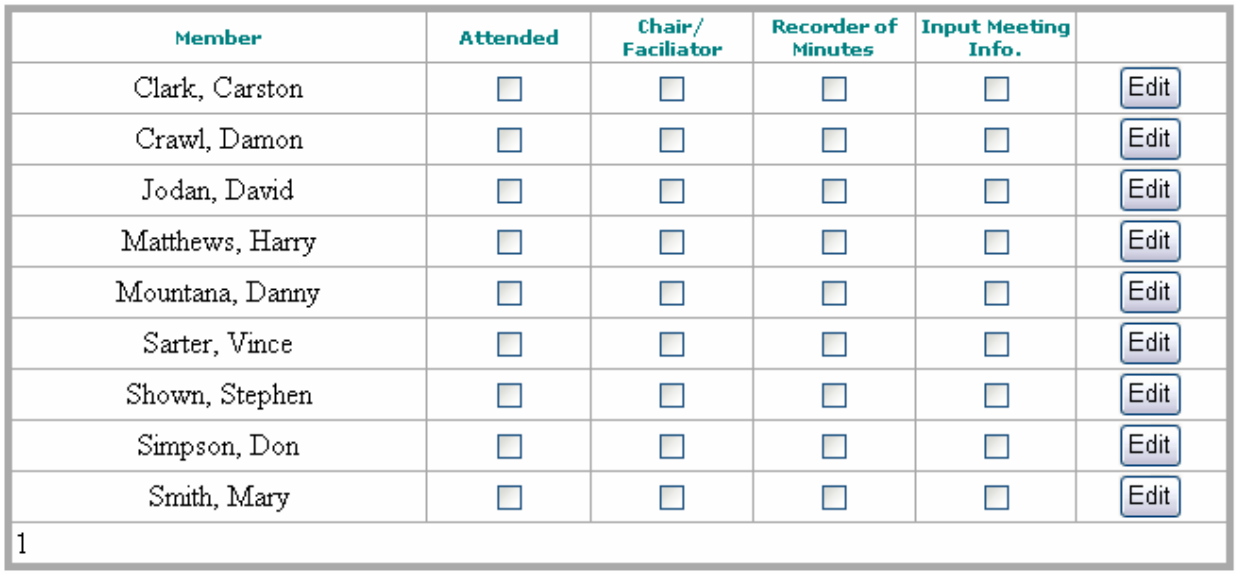
5. To edit a field without a predetermined list, select the field to edit by using the mouse to click inside of it. Use the Backspace and/or Arrow key to delete the unwanted characters from the field. Then type the information you want in the field.
6. Repeat steps 4-5 until all of the fields have been modified the way you want them.
7. All of the individuals in the chosen Meeting Group will be added to the meeting.



Member	Attended	Chair/ Faciliator	Recorder of Minutes	Input Meeting Info.	
Clark, Carston	☐	☐	☐	☐	Edit
Crawl, Damon	☐	☐	☐	☐	Edit
Jodan, David	☐	☐	☐	☐	Edit
Matthews, Harry	☐	☐	☐	☐	Edit
Mountana, Danny	☐	☐	☐	☐	Edit
Sarter, Vince	☐	☐	☐	☐	Edit
Shown, Stephen	☐	☐	☐	☐	Edit
Simpson, Don	☐	☐	☐	☐	Edit
Smith, Mary	☐	☐	☐	☐	Edit

1

8. Click the Edit button for each member to use the check boxes to indicate whether they were in attendance, whether they chaired or facilitated the meeting, and/or whether they recorded the minutes.

Matthews, Harry	☐	☐	☐	☐	Update	Cancel

9. Click the Update button to save any changes or additions to a Staff member's administrative time.
   *Note: To exit this screen without saving any of the changes you have made, click Cancel.
10. Click Save from the left toolbar.
    *Note: To exit this screen without saving any of the changes you have made, click Cancel.

Deleting a Meeting Group

1. From the Meetings screen, use the Meeting Group dropdown list to locate a meeting group that has already been entered into the system.
2. Select the appropriate date from the Meeting Date dropdown.
   *Note: The most current date will be listed first.
3. Once the desired group is displayed, click Delete from the left toolbar.
4. A prompt appears stating "Are you sure?" Select the OK button.
5. You are returned to the previous screen and the record has been deleted from the system.
   *Note: Clicking Cancel from the left toolbar will return you to the previous screen and not delete the record.

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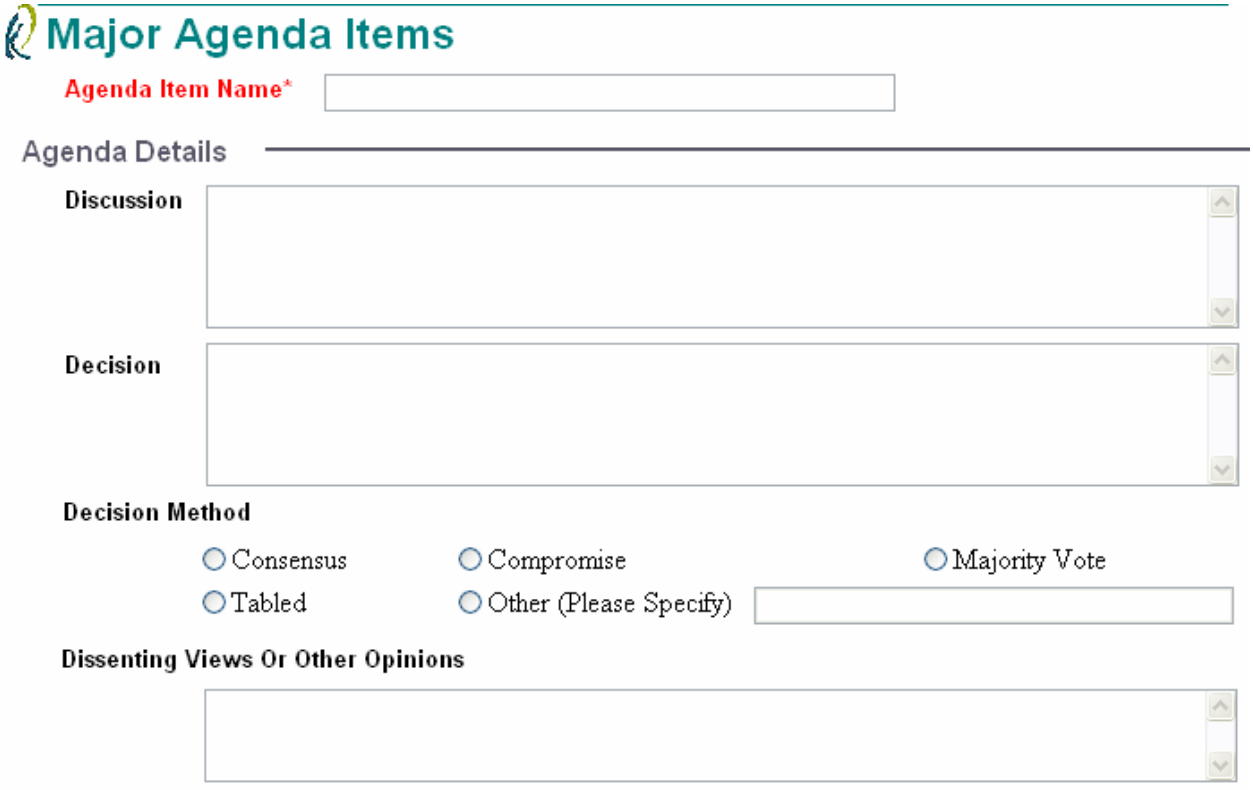
Entering an Agenda

Use the Agenda screen to enter specific agenda points for this meeting, decisions on the point, and the process through which the decision was reached.



1. From the Meeting screen, choose the appropriate Meeting Group* from the dropdown list that you wish to add an agenda to.
2. Select the appropriate date from the Meeting Date dropdown.
   *Note: The most current date will be listed first.
3. Click the Agenda button.
4. Click Add from the left toolbar.
5. Type the name of the agenda in the Agenda Item Name* field.
6. If you have the available information, you can fill in the Agenda Details for the meeting.
7. Click Save from the left toolbar.
   *Note: To exit this screen without saving any of the changes you have made, click Cancel.
8. Click Back from the left toolbar to go back to the Meetings screen.

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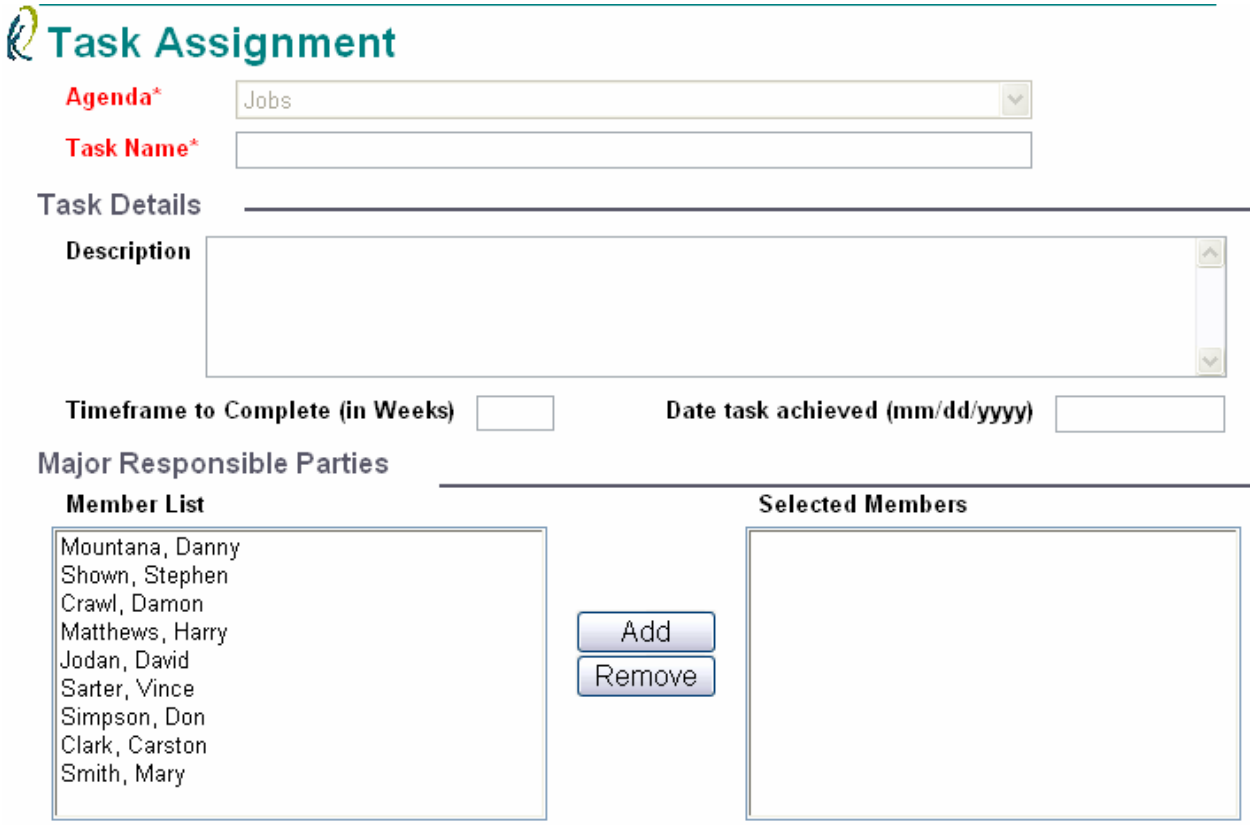
Entering a Task

Use the Task Assignment screen to assign projects to coalition members.



1. From the Meeting screen, choose the appropriate Meeting Group* from the dropdown list that you wish to add an agenda to.
2. Select the appropriate date from the Meeting Date dropdown.
   *Note: The most current date will be listed first.
3. Click the Task button.
4. Select the Agenda* you wish to add a task to.
5. Click Add from the left toolbar.
6. Type the name of the task in the Task Name* field.
7. If you have the available information, you can fill in the Task Details for the meeting.
8. Select the member(s) you would like to add as the responsible party from the Member List on the left and use the arrow buttons to move the member to the Selected Members List on the right. (See the table below for a description of the arrow buttons.)
9. Click Save from the left toolbar.
   *Note: To exit this screen without saving any of the changes you have made, click Cancel.
10. Click Back from the left toolbar to go back to the Meetings screen.

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Button	Function
	Moves only the selected staff/member from the **Member List** to the **Selected Members** list.
	Moves only the selected staff/member from the **Selected Members** list to the **Member List**.

COALITION REPORT

Page is under construction.

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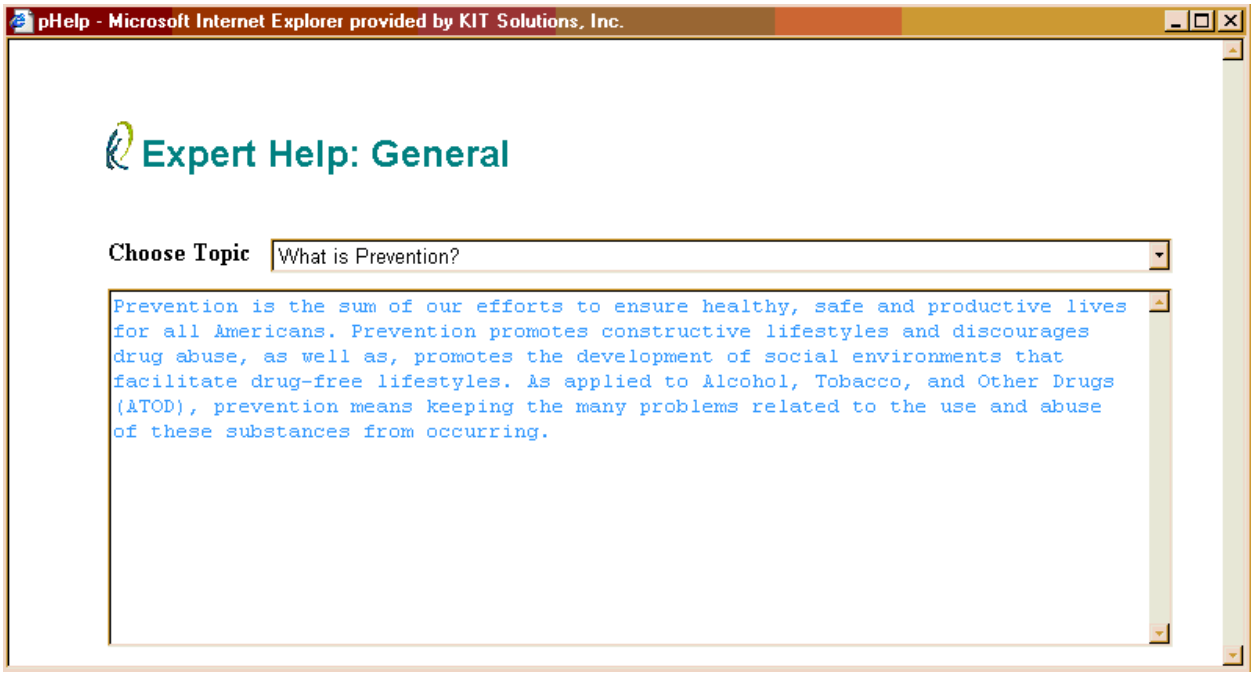
Knowledge base

Knowledge Base is the area of CADCAT used to store help information in relation to prevention and also any documents, codes, indexes, or web resources.

EXPERT HELP

The Expert Help section contains helpful information regarding prevention for South Carolina (DAODAS) Prevention. To access the Expert Help section, use the following steps:


pHelp - Microsoft Internet Explorer provided by KIT Solutions, Inc.
Expert Help: General
Choose Topic
What is Prevention?
Prevention is the sum of our efforts to ensure healthy, safe and productive lives for all Americans. Prevention promotes constructive lifestyles and discourages drug abuse, as well as, promotes the development of social environments that facilitate drug-free lifestyles. As applied to Alcohol, Tobacco, and Other Drugs (ATOD), prevention means keeping the many problems related to the use and abuse of these substances from occurring.

1. Click Knowledge Base from the main menu.
2. Click Expert Help from the submenu.
3. A new window will open.
4. Select the topic you'd like to view from the Choose Topic dropdown list. The help information will be displayed in the box below the dropdown list.
5. To close the Expert Help window, click on the .

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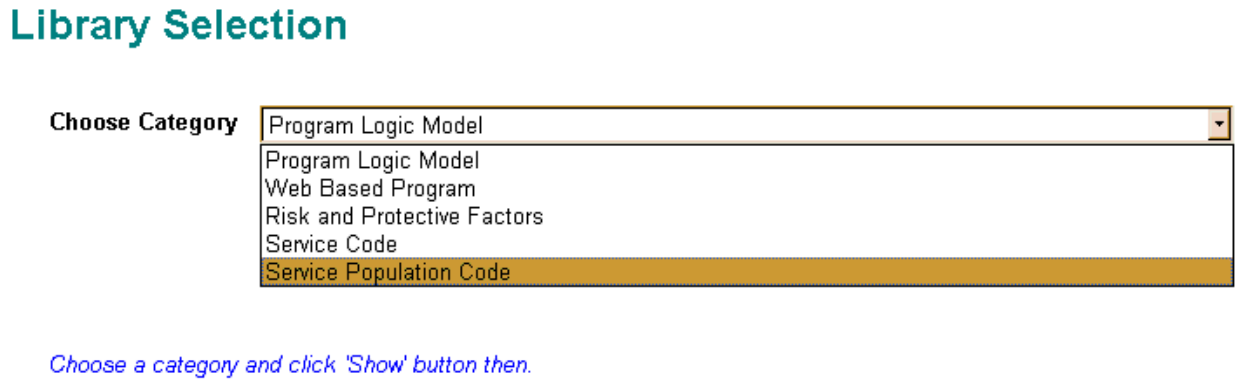
LIBRARY

The Library section is a repository of commonly requested documents, index code definitions, and other general documents that the CADCAT service would like to make available on the system. Use the following instructions to generate the reports in the Library area.



1. Click Knowledge Base in the menu.
2. Click Library from the submenu.
3. Select a category from the Choose Category dropdown.
4. Click the Show button to bring up the document.
5. The document will open in a Crystal Report Viewer. For more information on the Crystal Report Viewer or on saving or printing the document, see Using the Crystal Report Viewer section.
6. To close the Crystal Report Viewer window, click on the .

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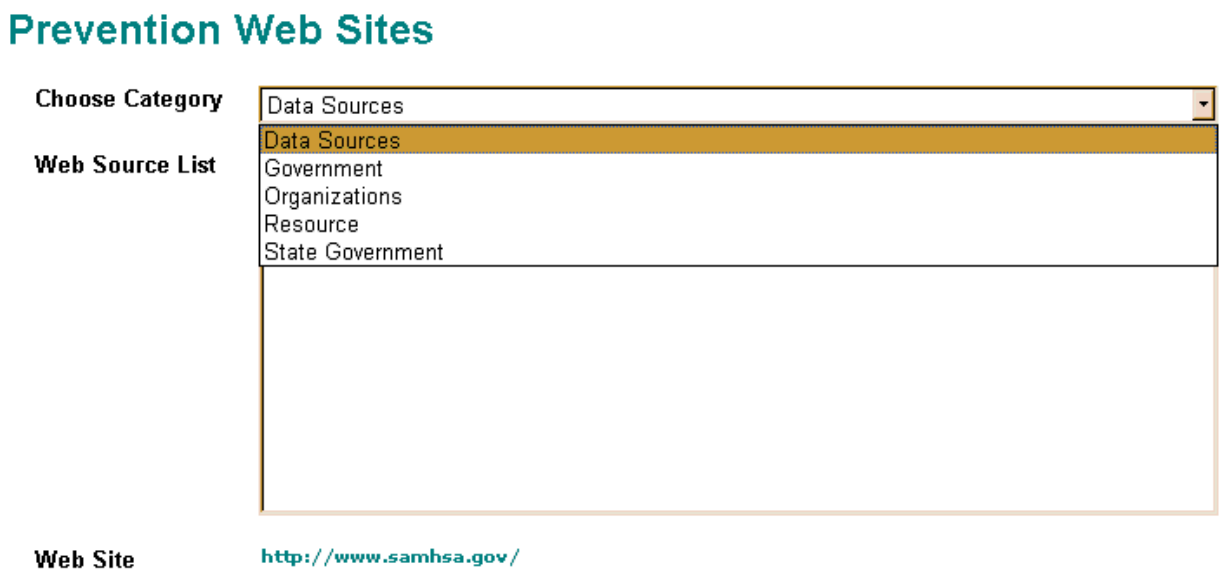
WEB SOURCES

The Web Sources area of the Knowledge Base section allows users and prevention workers to have a wealth of prevention links organized by the type of organization, agency, or topic they represent. To access the links that are available on the Web Sources section, use the following instructions:



1. Click Knowledge Base in the menu.
2. Click Web Sources from the submenu.
3. Select a category from the Choose Category dropdown.
4. Browse the *Web Source List* for the web site you would like to visit.
5. Select the *Web Source* you are interested in to highlight it.
6. Click on the link at the *Web Site* (located underneath the *Web Source List* box) corresponding to the *Web Source*.

7. A new window will open displaying the web site you chose.
8. To close the new web site window, click on the ✕.

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Administration

There are several functions available under the Administration module. The table below lists the functions. You can get instructions on how to use the functions in CADCAT by clicking on the name. Use your browser's

button to return to this table.

Organization	This area allows the user to input their organization information into CADCAT.
Staff	All staff members must be registered before they can be attached to a single or recurring event or if they need to enter data into CADCAT.
Administrative Time	Staff may record time that is related to planning, development or community events in this module. For Example: Program Development of time spent prior to the first meeting of a recurring program. Includes time for planning, finding, learning, or developing curriculum, and recruiting participants.
Change Password	This area allows the user to change the password for the account they are currently logged in with.

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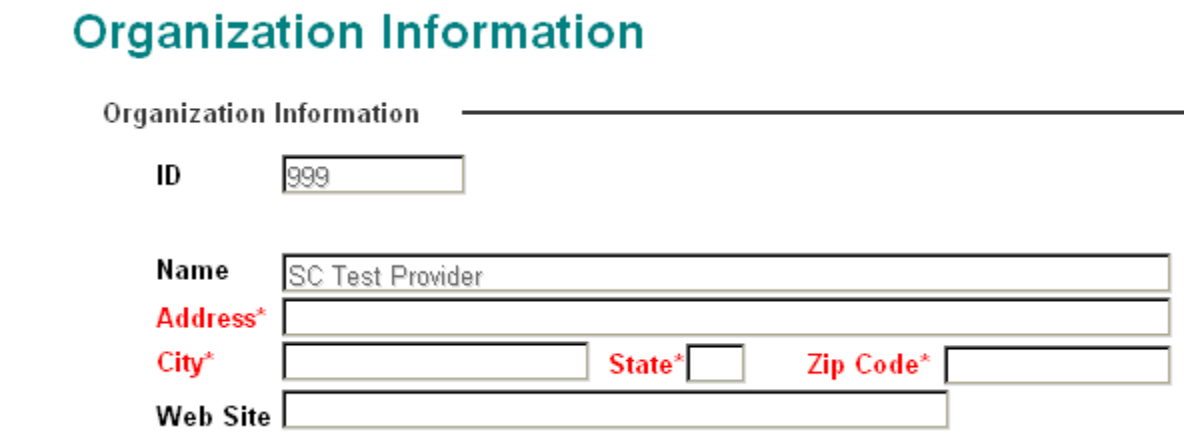
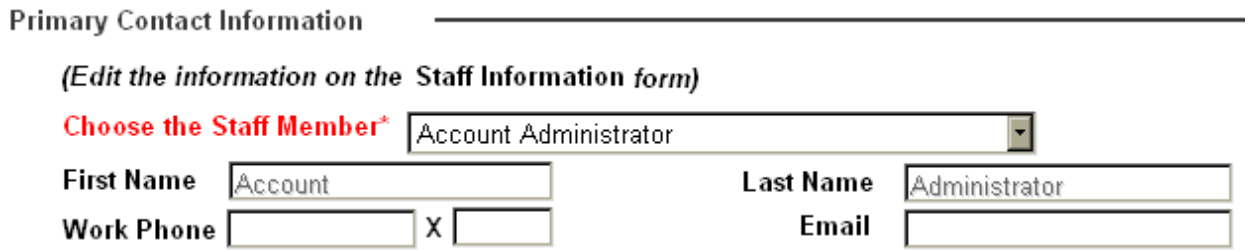
EDITING THE ORGANIZATION INFORMATION

In this area is you will enter your organization's contact information.



1. Click Administration in the menu.
2. Click Organization from the submenu.
3. Click Edit from the left toolbar.
4. Fill in the organization's Address, City, State, and Zip Code.
5. In the Primary Contact Information area, click the black arrow on the right side of the Choose the Staff Member* blank and select one of the staff members to serve as a contact person for your organization.



6. Click Save from the left toolbar.

*Note: To exit this screen without saving any of the changes you have made, click Cancel.

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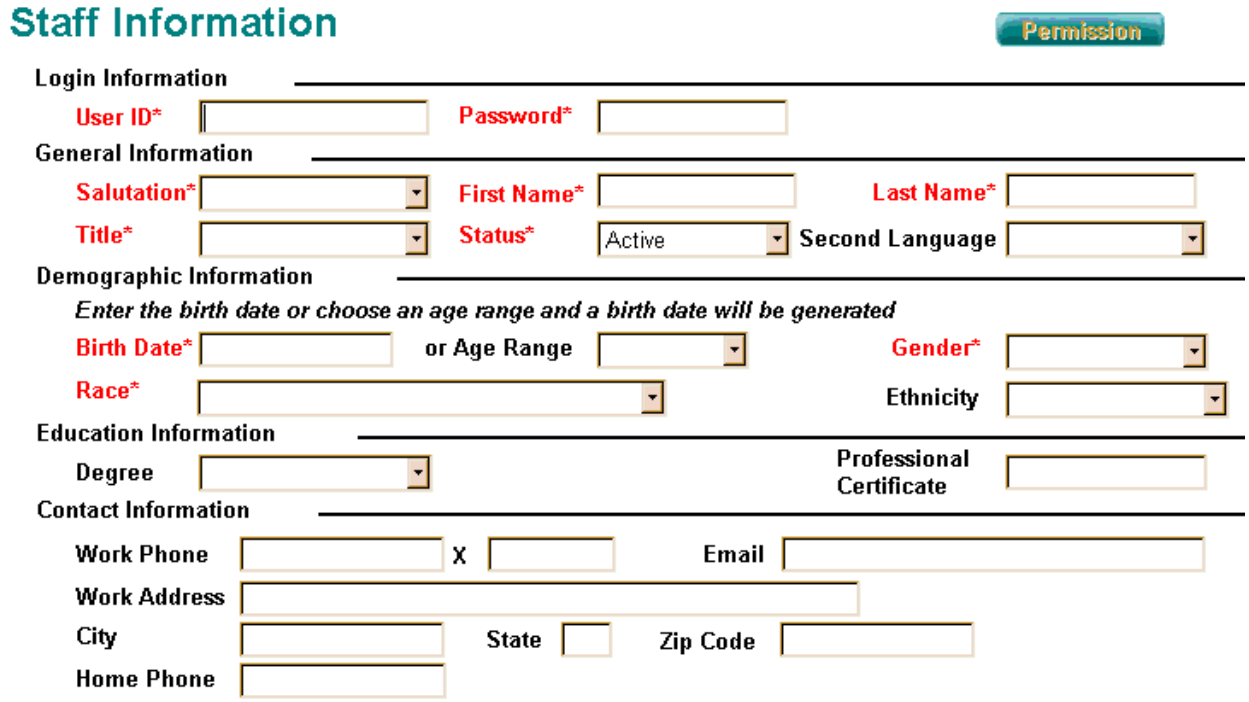
REGISTERING A STAFF MEMBER

Staff Registration enables Service Programs to track productivity by staff members and *staff registration needs to be done before entering service data.*

A staff member MUST be entered if he/she will:

1. Need access to the database (Data Entry).
2. Be performing a prevention service.



1. Click Administration in the menu.
2. Click Staff from the submenu.
3. Click Add from the left toolbar.
4. Enter in the staff member's Login Information.
    a. The User ID* will be the login name used by the staff member. This may be anything that you choose. Choosing a User ID and Password scheme will simplify administration. (For Example: Using first initial and last name for the User ID.)
    b. The Password* field is the password the user will type in along with the User ID and organization number to log into CADCAT. This may be anything that you choose. Once users log in themselves, they can use the Change Password area to change their own password.
5. Fill in all the required fields (i.e., any red field with an asterisk) of information for your staff member.
6. Click Save from the left toolbar.

    *Note: To exit this screen without saving any of the changes you have made, click Cancel.

7. Click the Permission button once you have saved the staff member.

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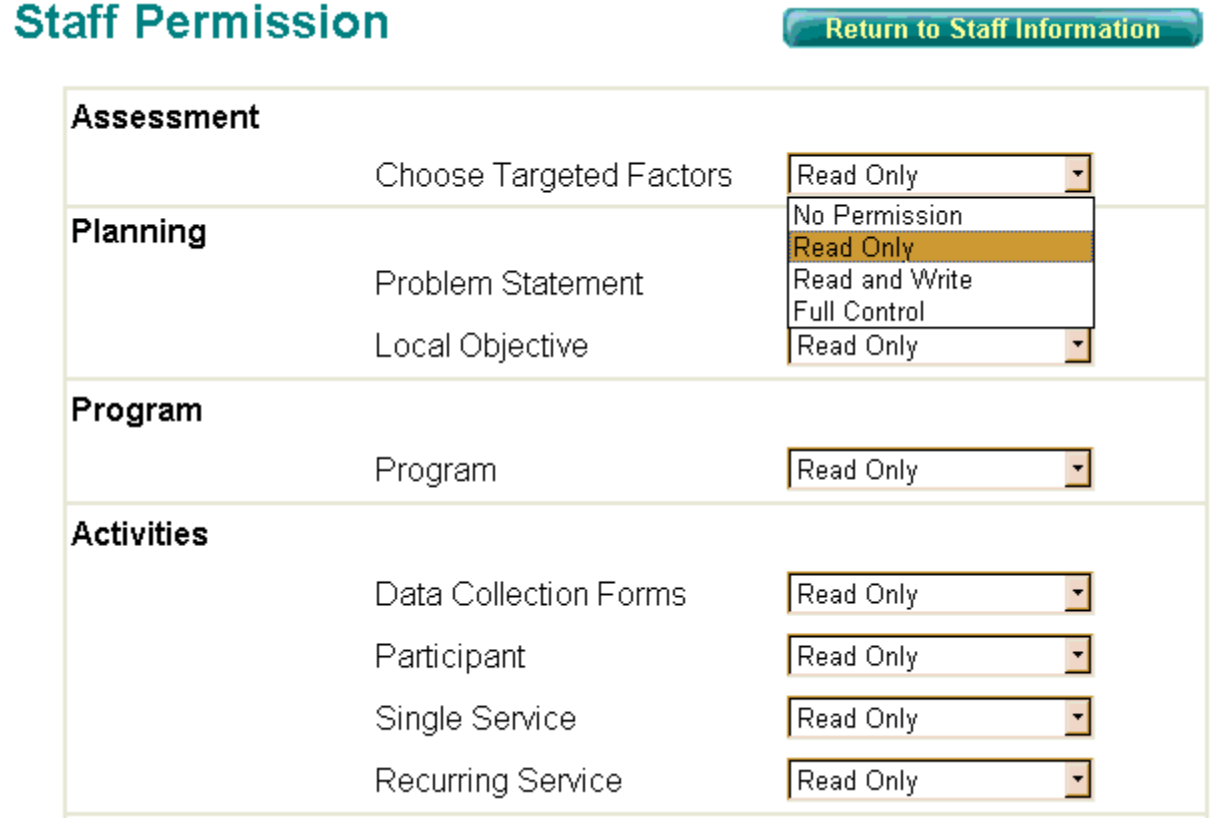
Modifying Staff Permissions

Once you have saved the new staff entry, click the Permission button set the staff member's permissions (the following screen shot will appear):



(This screen shot is a partial view of the possible permissions that can be set for each area of the program. If you were viewing this screen on the system, you would be able to scroll down to see other areas and access levels for those areas.)

You can tailor a specific user's access level to areas of the CADCAT service. The permissions are defaulted to a normal access level for a particular user, but anyone that has access to the Staff area can modify access levels for any user on the system. The different levels of access can be set as follows:

No Permission (Staff cannot view)
Read Only (Staff can only view information)
Read and Write (Staff can add and enter information)
Full Control (Staff can delete information)

1. Click Edit from the left toolbar to alter the permissions for the staff member.
2. Set the permissions for the each module according to the level of permission the staff should have.
3. Repeat step 2 as many times as necessary to modify any additional access levels.
4. Click Save from the left toolbar.

*Note: To exit this screen without saving any of the changes you have made, click Cancel.

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Editing Staff Information

1. From the Staff Information screen, find the staff member you wish to edit by clicking Search from the left toolbar. (See Using the Search Feature for information on how to search for previously entered information).
2. Once the desired staff member is displayed, click Edit from the left toolbar.
3. To edit a field that has a predetermined list (i.e., it has a black down-arrow on the right end of the box), select the desired value from the list.
4. To edit a field without a predetermined list, select the field to edit by using the mouse to click inside of it. Use the Backspace and/or Arrow key to delete the unwanted characters from the field. Then type the information you want in the field.
5. Repeat steps 3-4 until all of the fields have been modified the way you want them.
6. Click Save from the left toolbar.

   *Note: To exit this screen without saving any of the changes you have made, click Cancel.

Deleting Staff Information

1. From the Staff Information screen, find the staff member you wish to delete by clicking Search from the left toolbar. (See Using the Search Feature for information on how to search for previously entered information).
2. Once the desired staff member is displayed, click Delete from the left toolbar.
3. A prompt appears stating "Are you sure?" Select the OK button.
4. You are returned to the previous screen and the record has been deleted from the system.

   *Note: Clicking Cancel from the left toolbar will return you to the previous screen and not delete the record.

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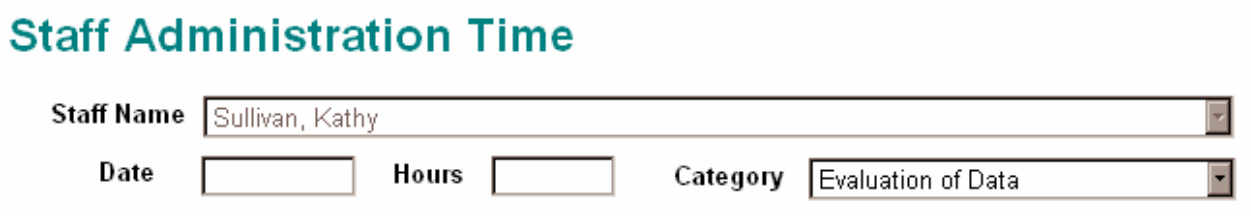
ADDING ADMINISTRATIVE TIME

The Administrative Time area allows users to indicate time spent on prevention that is not directly related to a service. Time spent during trainings, meetings, general planning, or even entering information into CADCAT can be classified as administrative time. To enter administrative time into CADCAT, use the following method:



1. Click Administration in the menu.
2. Click Administrative Time from the submenu.
3. From the dropdown list, select the Staff Name to which you would like to add administrative time entries for.
4. Click Add from the left toolbar.
5. Enter the Date (use either format: MM/DD/YY or MM-DD-YY) and a number of Hours.
6. Choose a Category describing the administrative time from the dropdown list.
7. Click Save from the left toolbar.

   *Note: To exit this screen without saving any of the changes you have made, click Cancel.

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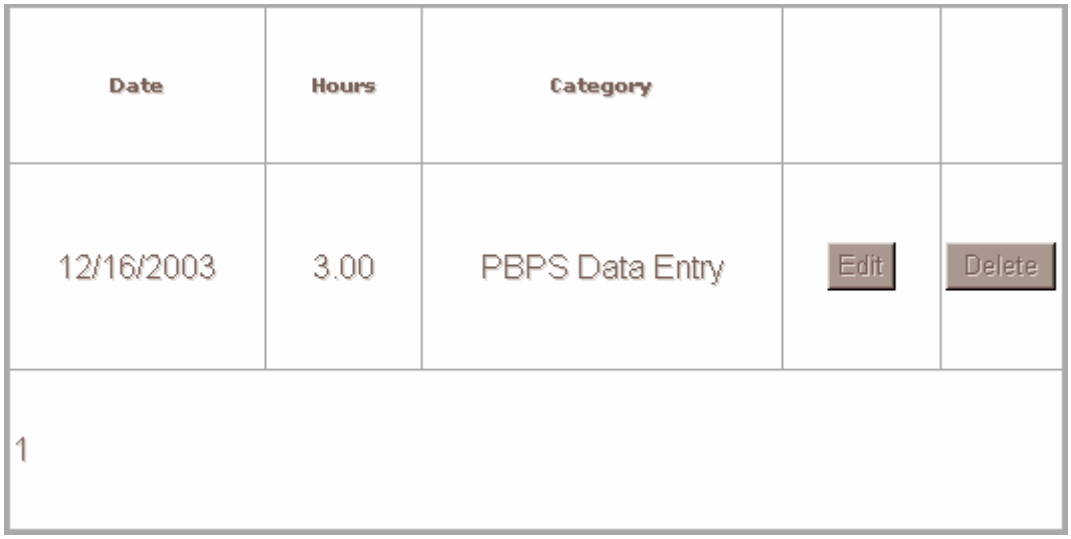
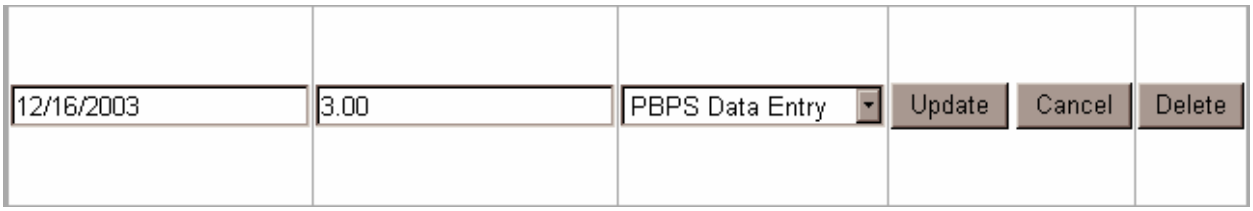
Editing Administrative Time

After you enter your Admin Time in the form above, the information will be saved in a table shown below.



To edit an existing Admin Time entry:

1. From the dropdown list, select the **Staff Name** to which you would like to edit administrative time entries from.
2. Click **Edit** from the left toolbar.
3. To edit a specific date, click **Edit** on the row with the correct date.



4. To edit a field that has a predetermined list (i.e., it has a black down-arrow on the right end of the box), select the desired value from the list.
5. To edit a field without a predetermined list, select the field to edit by using the mouse to click inside of it. Use the Backspace and/or Arrow key to delete the unwanted characters from the field. Then type the information you want in the field.
6. Repeat steps 4-5 until all of the fields have been modified the way you want them.
7. Click the **Update** button to save any changes or additions to a Staff member's administrative time.

   *Note: To exit this screen without saving any of the changes you have made, click **Cancel**.
8. Click **Back** from the left toolbar.

Deleting Administrative Time

1. From the **Administrative Time** screen, select the **Staff Name** to which you would like to delete administrative time entries from.
2. To delete all administrative time for a specific staff member, click **Delete** on the left toolbar.
3. To delete a specific date, click **Edit** from the left toolbar
4. Click **Delete** on the row with the date you would like removed.
5. You are returned to the previous screen and the record has been deleted from the system.
6. Click **Back** from the left toolbar.

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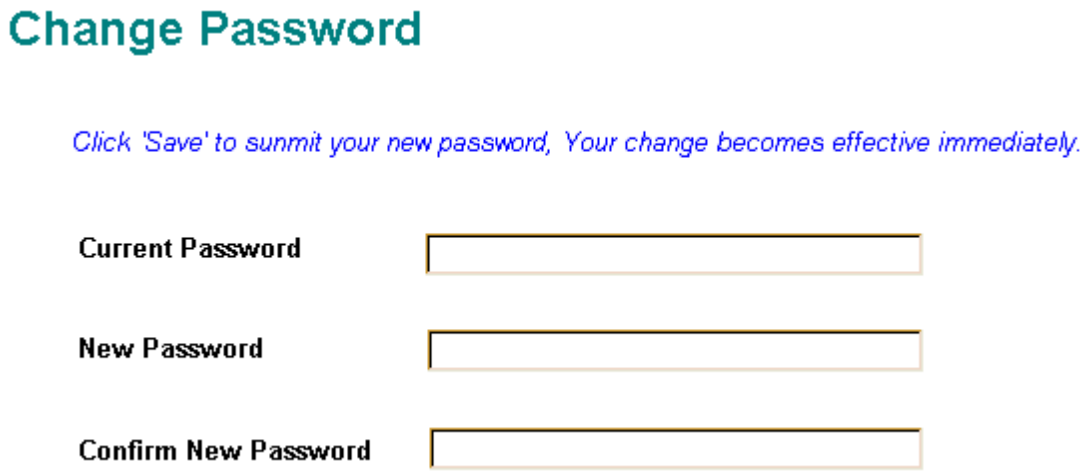
CHANGE PASSWORD

The Change Password module allows the user to change the password on the account they are currently logged in on.


Change Password
Click 'Save' to sunmit your new password, Your change becomes effective immediately.
Current Password
New Password
Confirm New Password

1. Click Administration in the menu.
2. Click Change Password from the submenu.
3. Enter your Current Password.
4. Enter your New Password.
5. Confirm your New Password.
6. Click Save from the left toolbar.
   *Note: To exit this screen without saving any of the changes you have made, click Cancel.
7. You will receive a message stating it was successfully changed.

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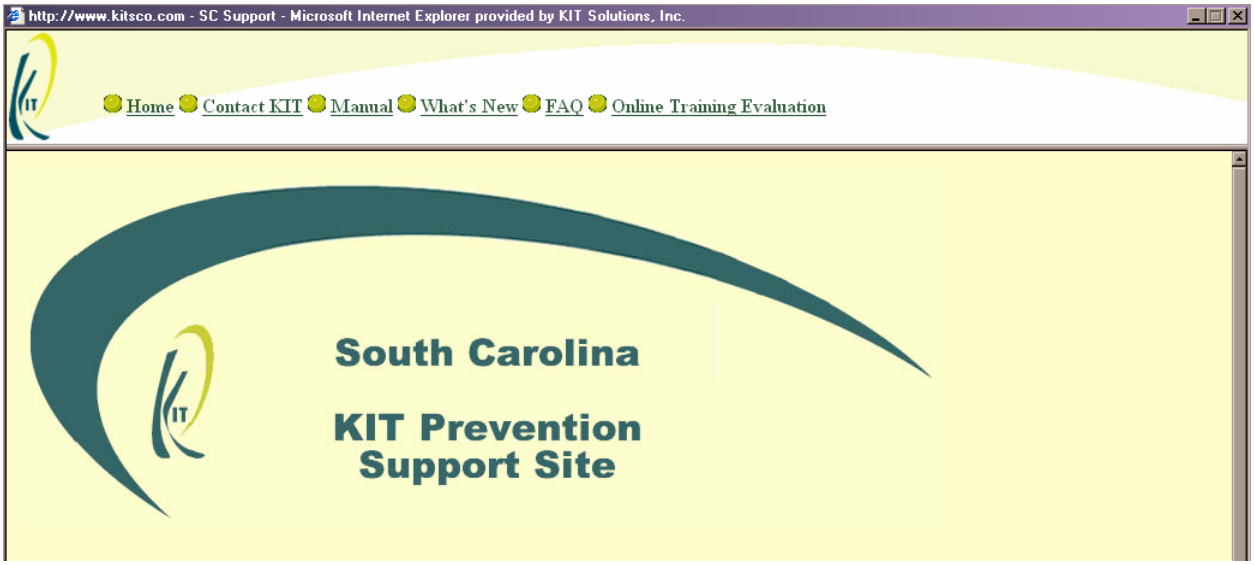
Kit Support



(This screen shot is a partial view of the Support Site. If you were viewing this screen on the system, you would be able to scroll down to see other areas and access levels for those areas.)

1. To reach the KIT Solutions support site, click KIT Support from the main menu.
2. To submit a problem, question, or suggestion for improvement to KIT Solutions technical support team, click the Contact KIT link.
3. To find this manual in an online version, click the Manual link.
4. To see a list of new features, improvements, or announcements for the CADCAT service, click the What's New link.

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